



**PUBLIC OPINION
STRATEGIES**

NEVADA Statewide Survey



**Key findings from a statewide survey of
500 likely voters in Nevada, with 125 cell phone
interviews, conducted February 16-18, 2013.**

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Project #13058



Methodology

Public Opinion Strategies is pleased to present the key findings of a statewide telephone survey conducted in Nevada. The survey was completed February 16-18, 2013, among 500 likely voters, with 125 cell phone interviews, and has a margin of error of $\pm 4.38\%$.

Glen Bolger was the principal researcher on this project. Jim Hobart was the project director, and Kyle Clark provided analytical support.



Political Environment

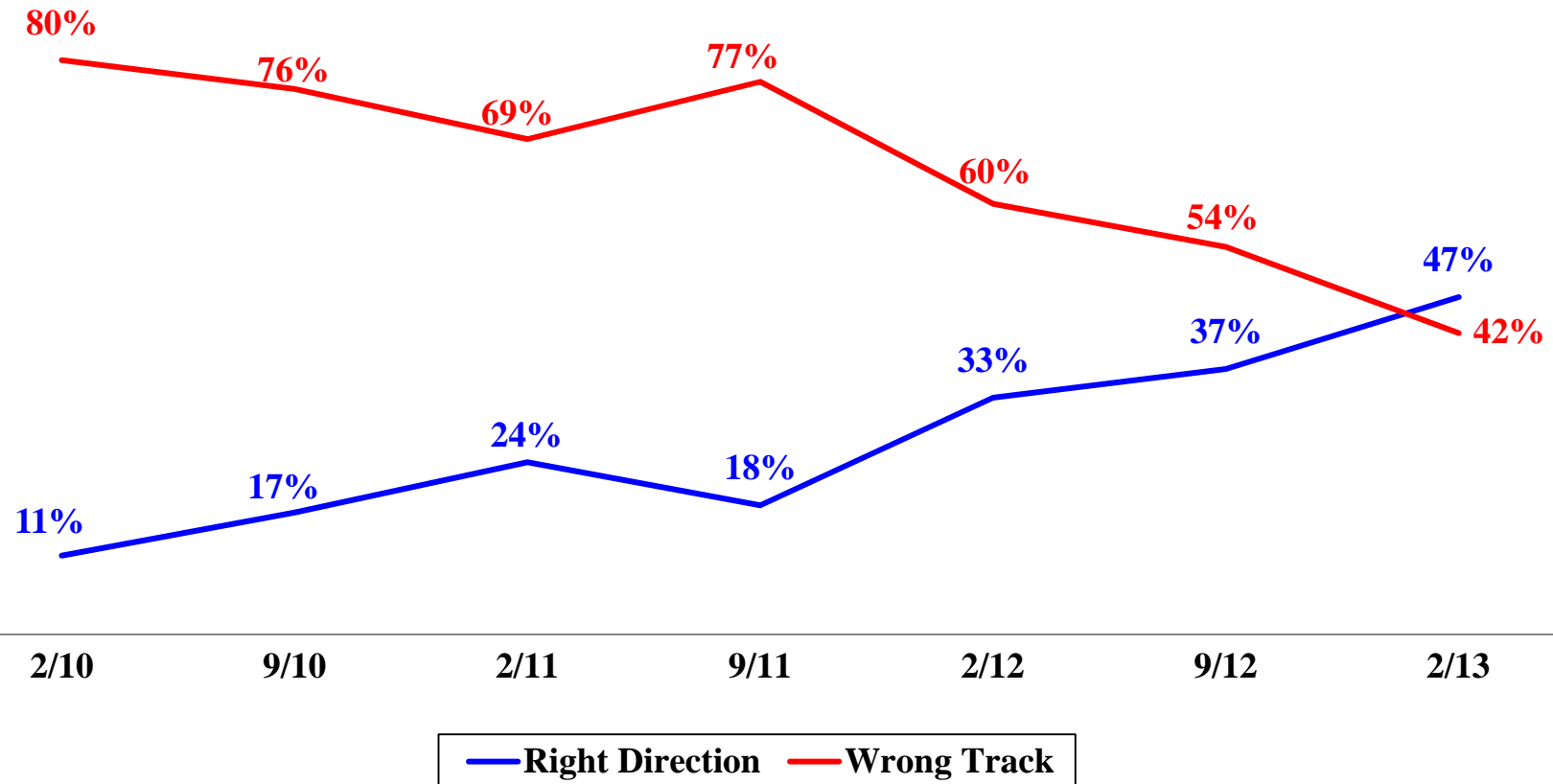


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The mood in Nevada continues to improve, and for the first time in years, a plurality of voters say the state is headed in the right direction.

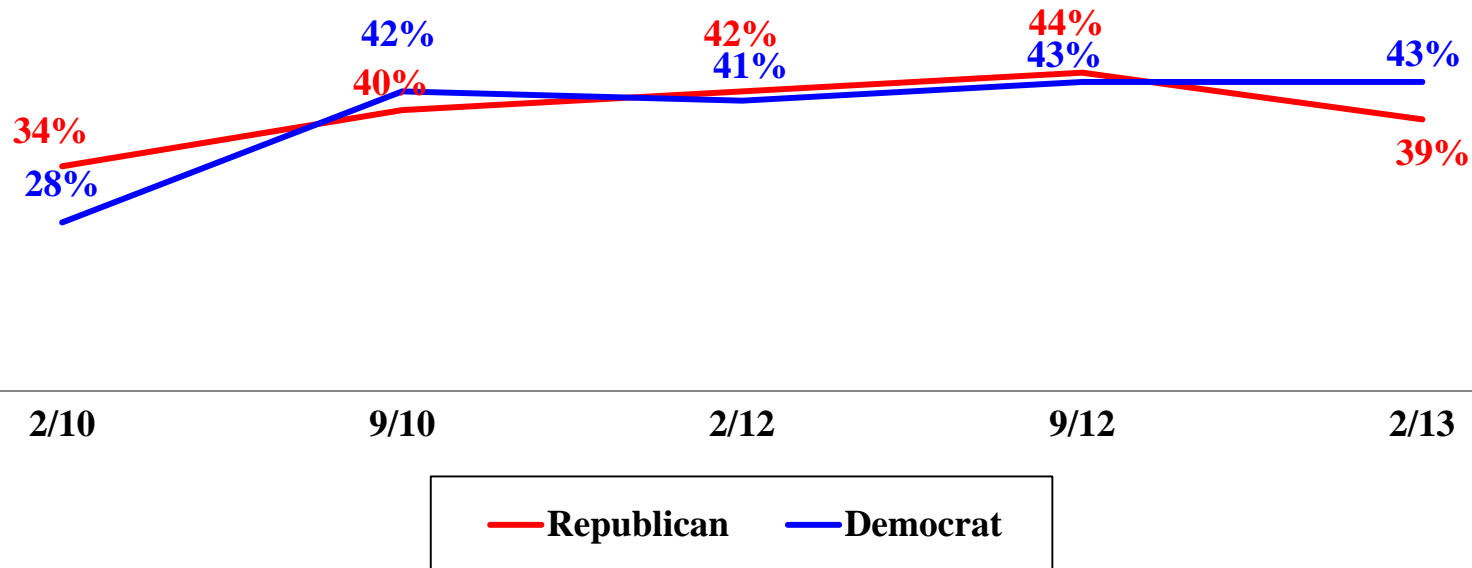
“Would you say things in Nevada are going in the right direction, or have they pretty seriously gotten off on the wrong track?”

State Mood Trend



The Democrats have a slight advantage on the state legislative generic ballot.

“If the election for State Legislature were being held today, for whom would you vote...the Republican candidate or the Democratic candidate?”



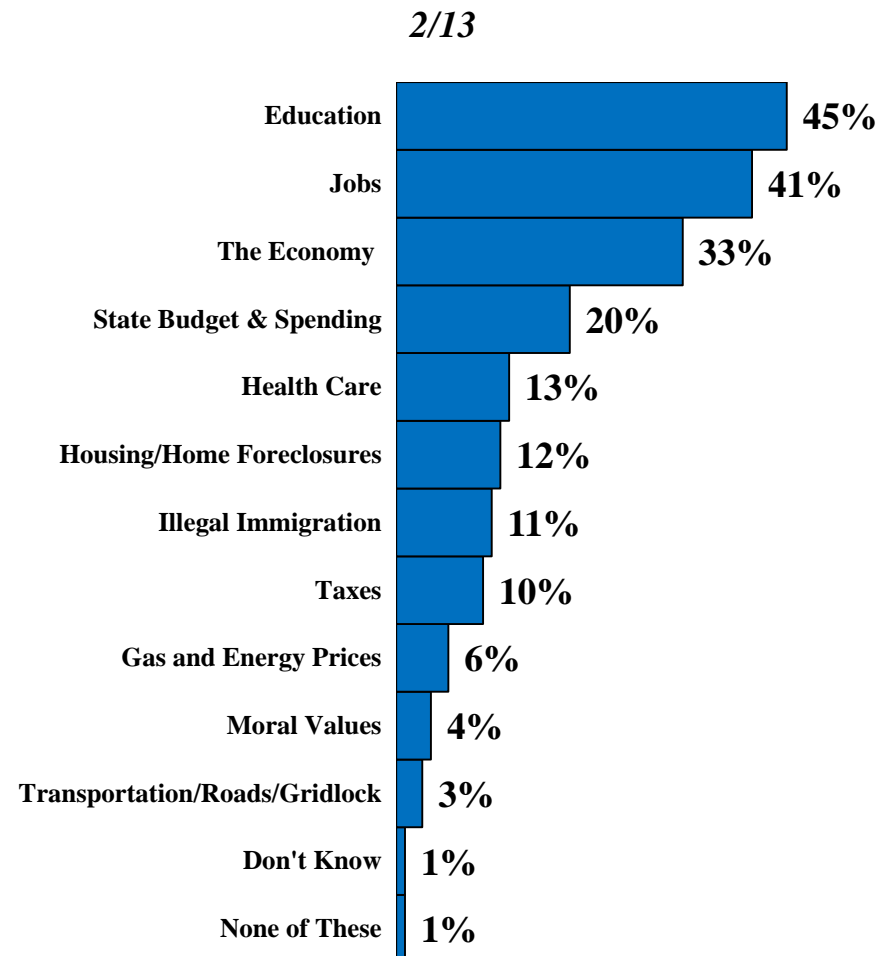
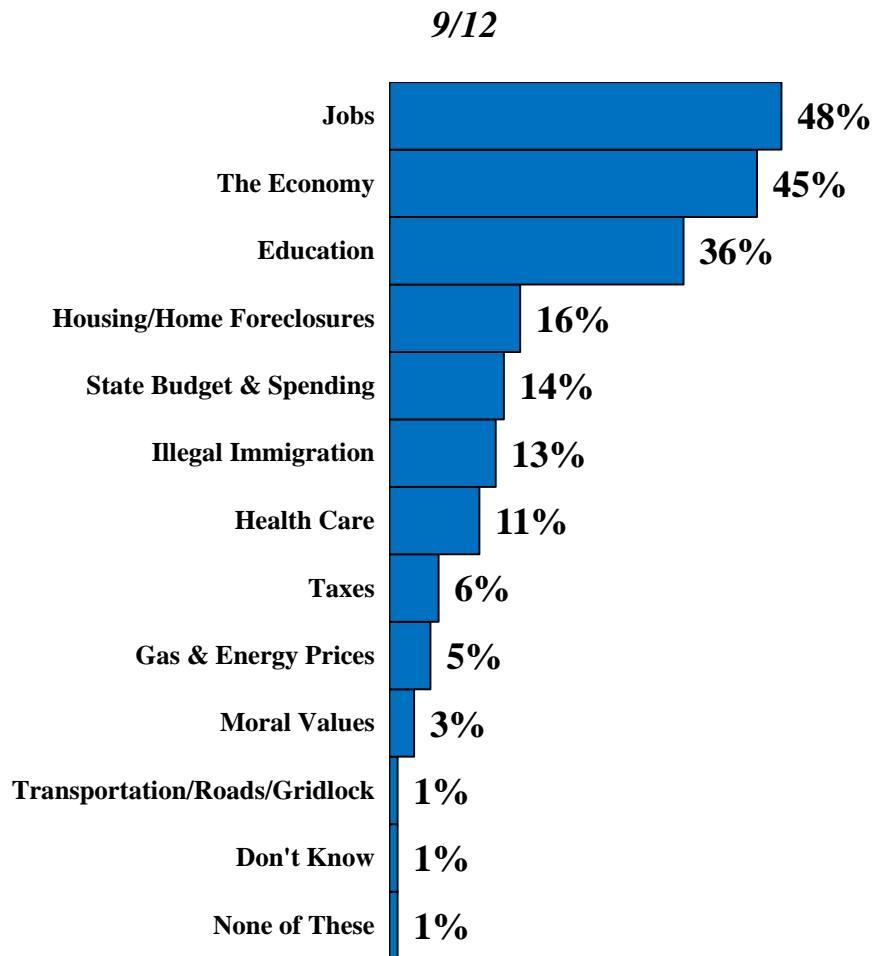


Issues

Education has surpassed jobs and the economy as voters' top priority for the Governor and State Legislature.

“Which ONE of the following issues should be the top priority of Nevada’s Governor and State Legislature? And which of the following is the NEXT most important priority?”

Combined Choices



Education and jobs are the top issues for all party subgroups except base GOPers.

*By Party
(Combined Choices)*

Base GOP (21%)	Soft GOP (13%)	Independent (22%)	Soft Democrat (13%)	Base Democrat (29%)
The Economy (41%)	Education (47%)	Jobs (45%)	Education (49%)	Education (55%)
Jobs (34%)	Jobs (47%)	Education (41%)	Jobs (40%)	Jobs (41%)
Education (31%)	The Economy (28%)	The Economy (31%)	The Economy (28%)	The Economy (32%)
State Budget & Spending (24%)	State Budget & Spending (27%)	State Budget & Spending (24%)	State Budget & Spending (20%)	Health Care (19%)



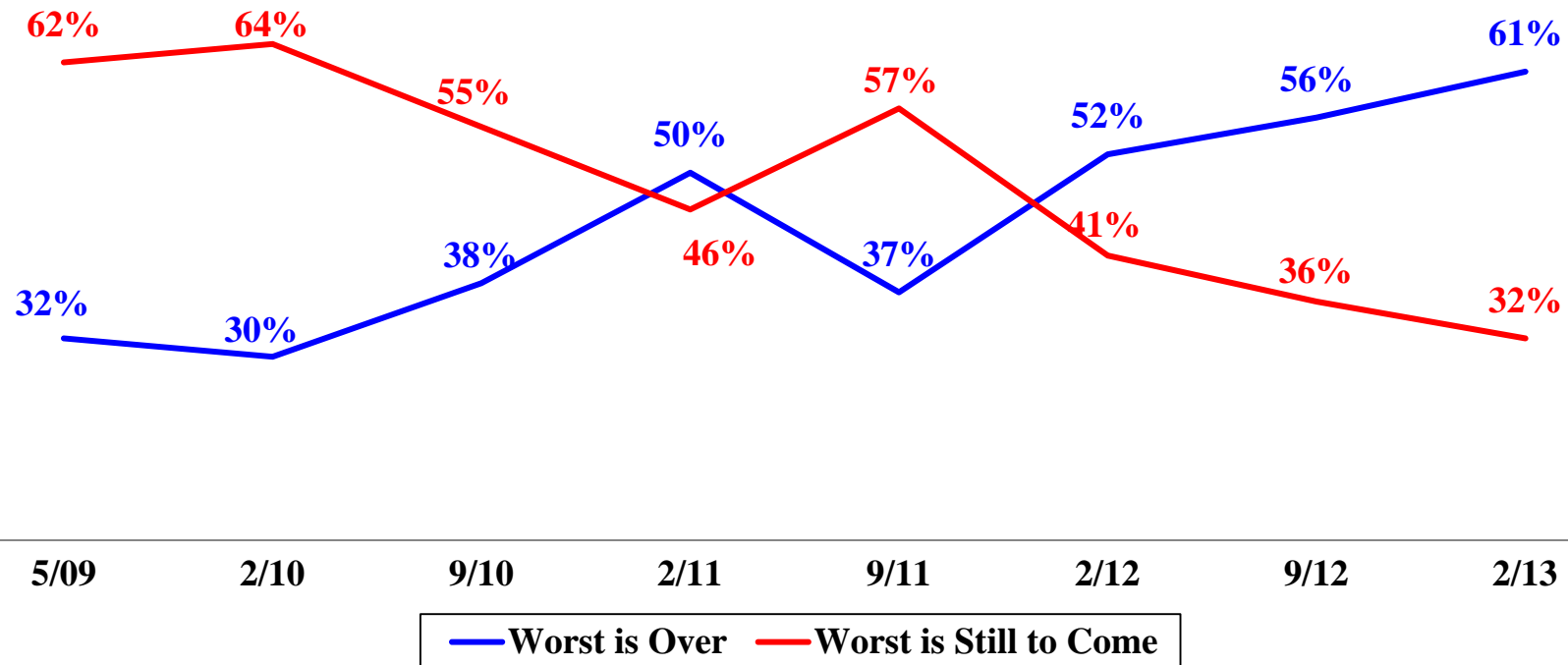
The Economy & Unemployment



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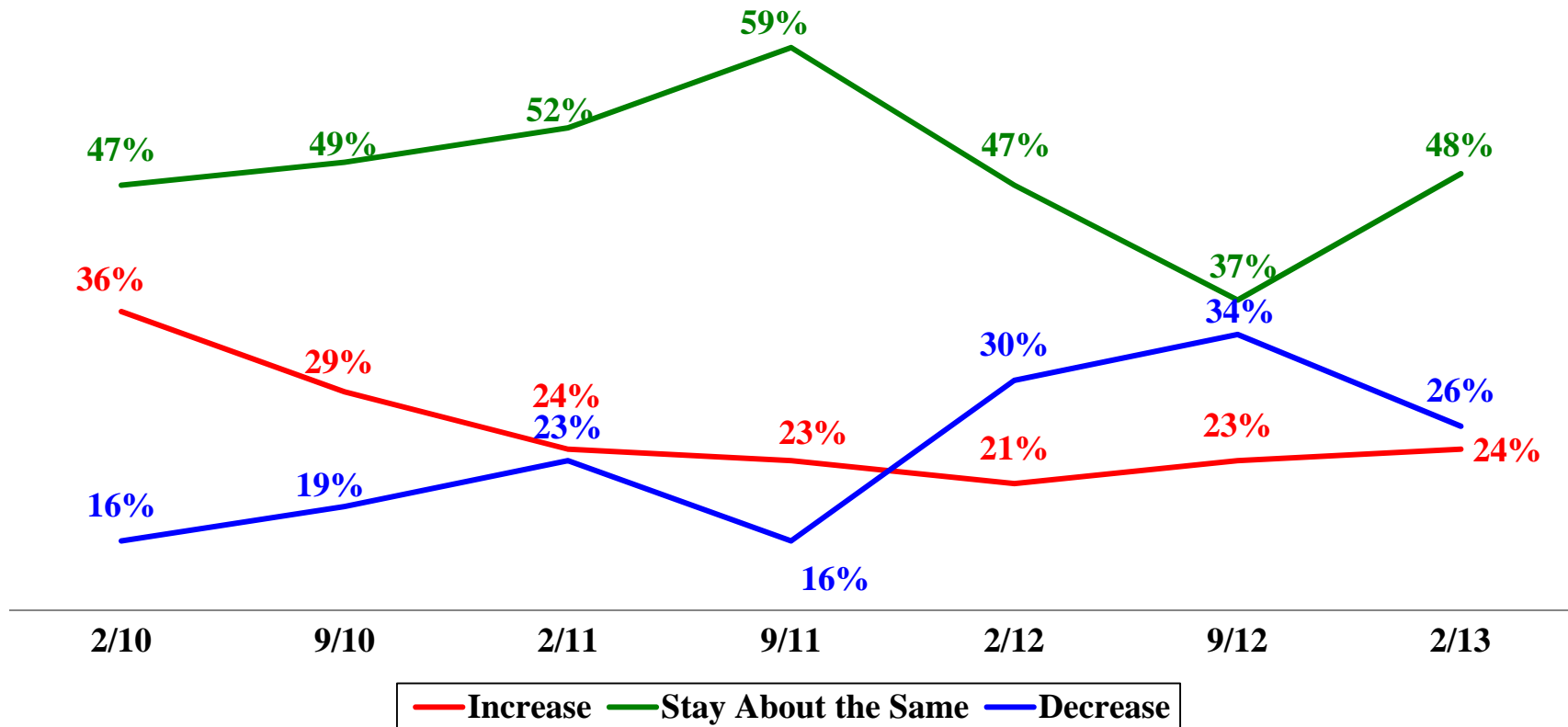
The number of Nevadans who believe the worst is over continues to increase.

“Nevada has recently been going through a difficult time. Do you feel that the worst is over or is the worst is still to come?”



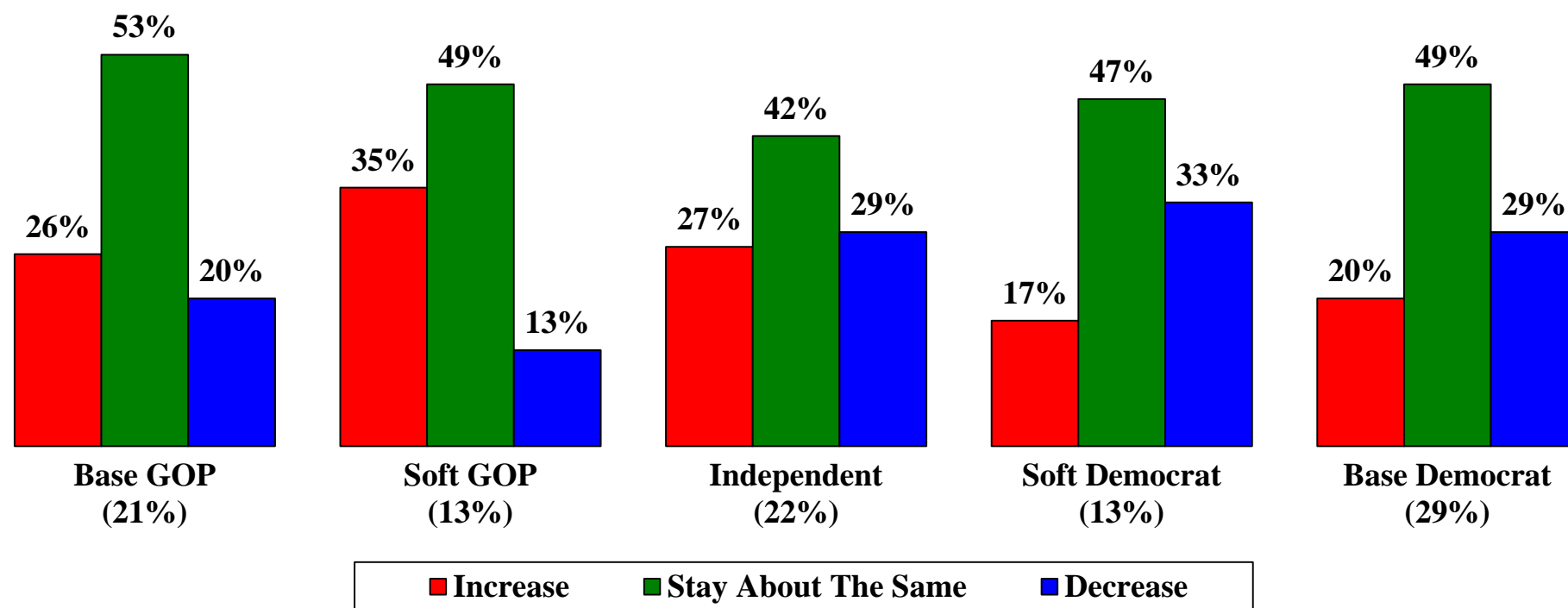
Just as in February 2012, nearly half of voters believe that the unemployment rate will stay about the same.

*“And, as you may know, Nevada’s unemployment rate is one of the highest in the nation.
Over the next year, do you think Nevada’s unemployment will...”*



Pluralities across the partisan spectrum—and a majority of base GOPers—believe the unemployment rate in the state will stay about the same over the next year.

By Party





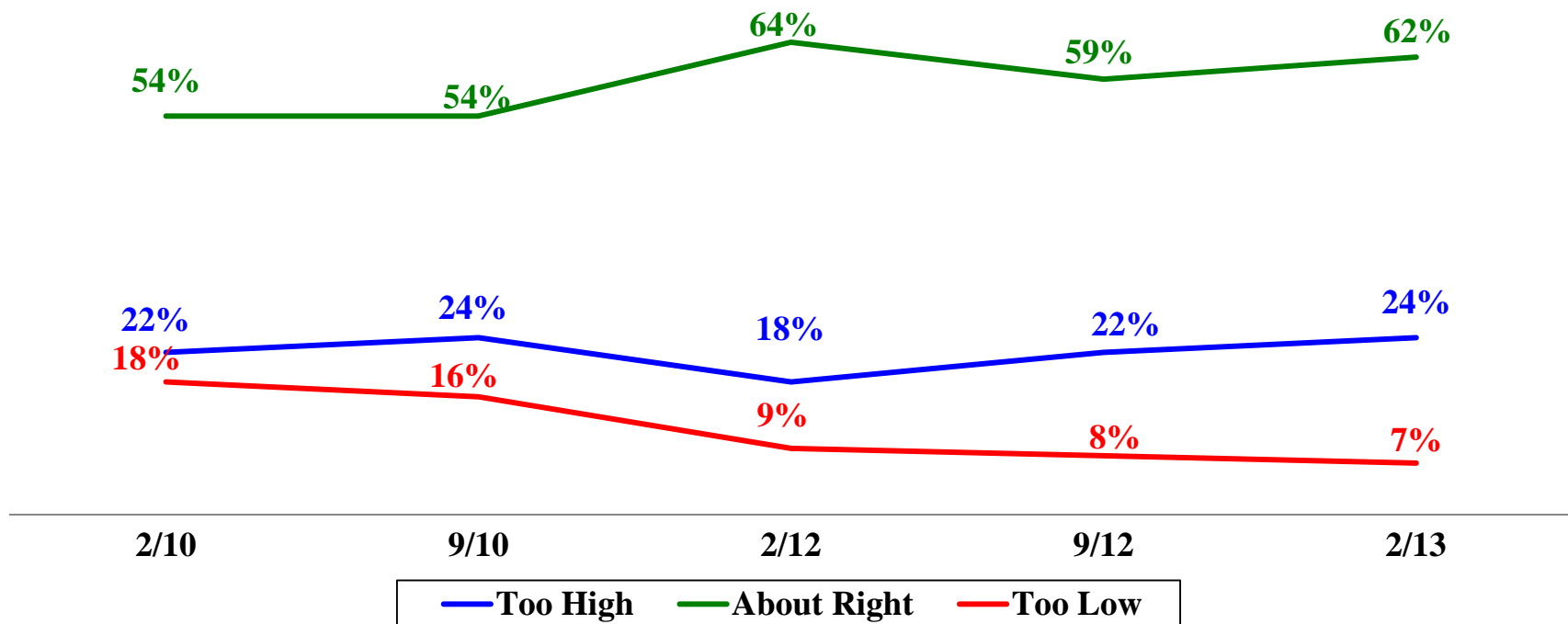
State Budget & Taxes



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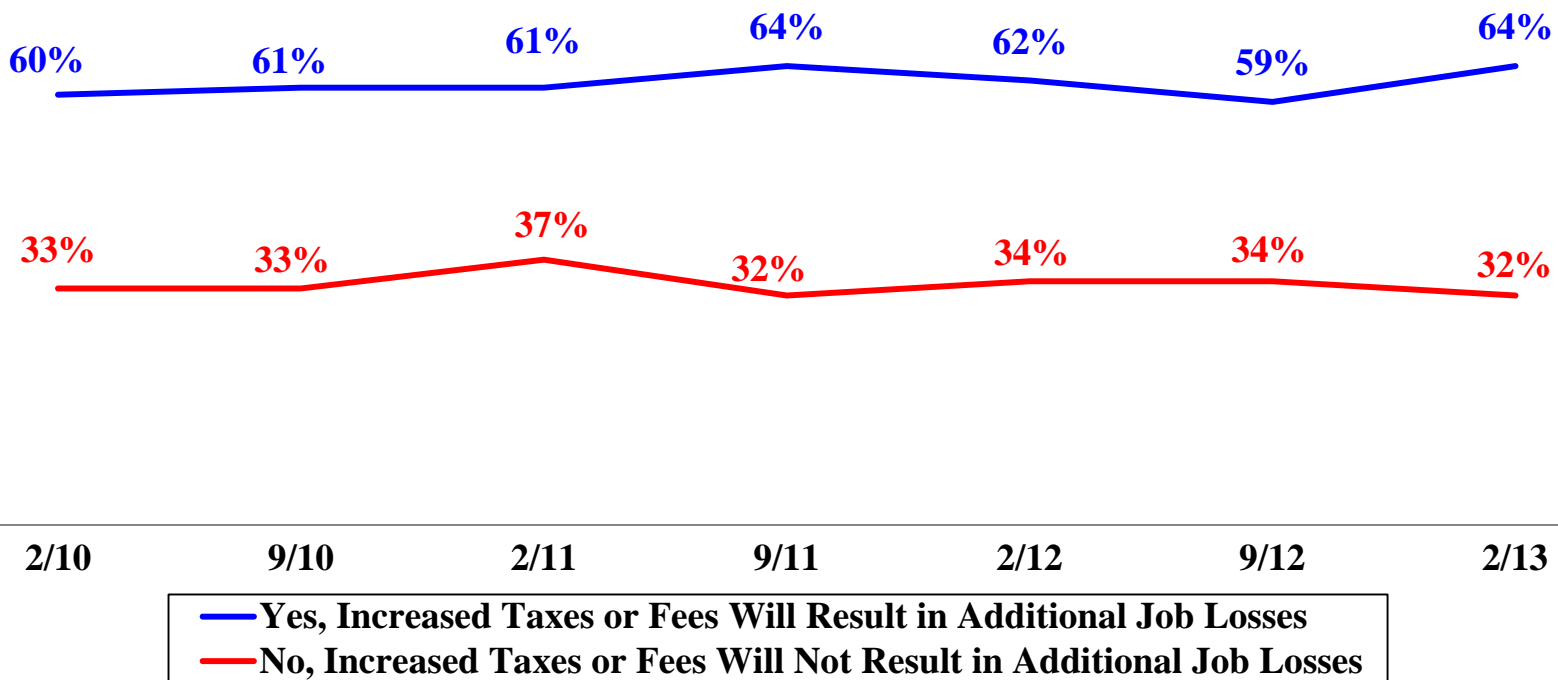
Most Nevadans continue to believe the amount of state taxes they pay is about right. Only one-quarter say they are too high.

“Thinking about the state taxes you pay, do you consider the overall amount of state taxes you pay to be...?”



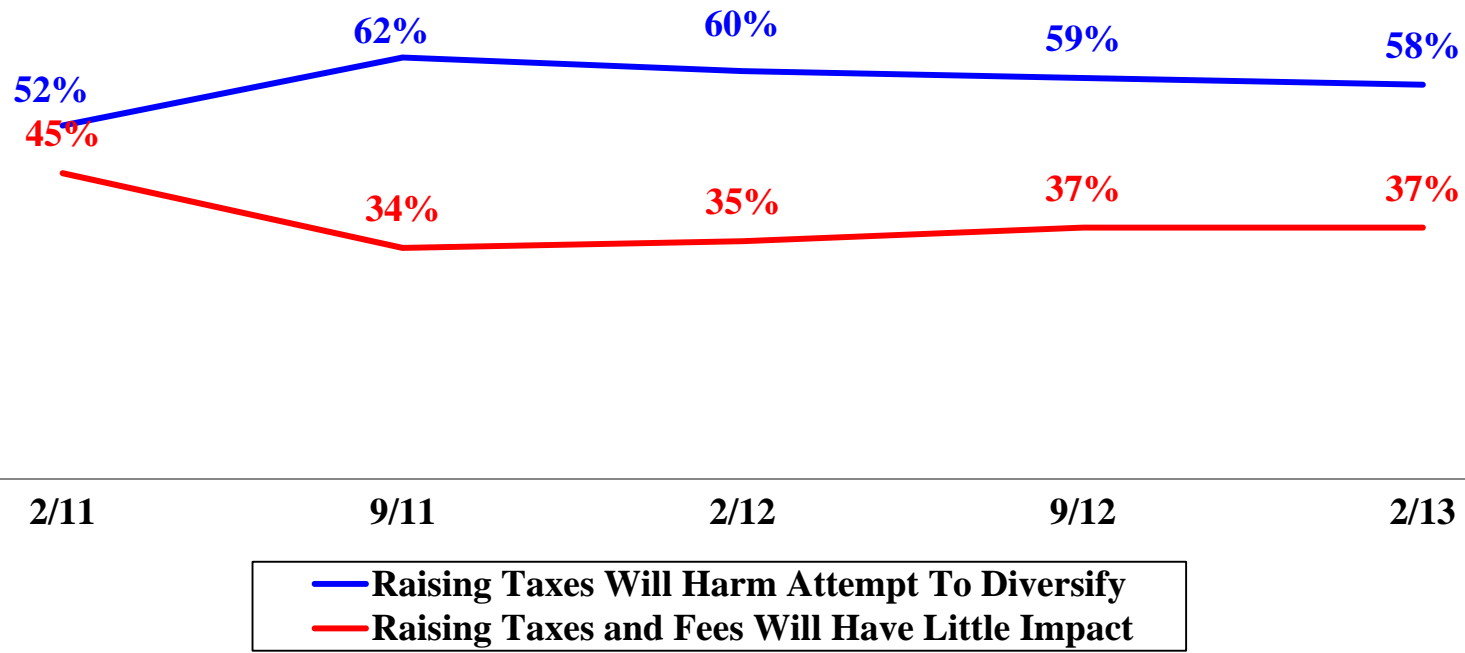
Nevadans continue to say increased taxes or fees will result in additional job losses.

“For a long time, Nevada led the nation in job creation and economic growth. However, since the recession began Nevada has lost thousands of jobs and now leads the nation in unemployment. Do you believe that increased taxes or fees on businesses will result in additional job losses?”



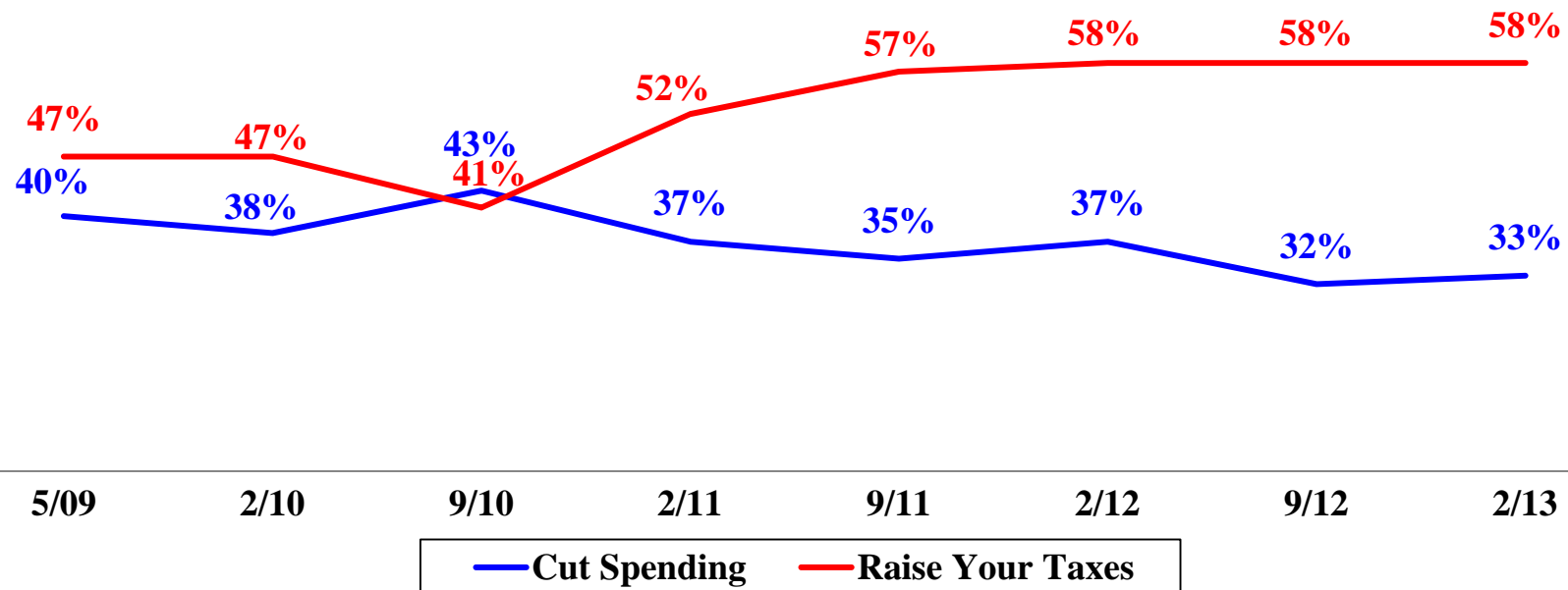
Voters continue to say raising taxes/fees on businesses will harm attempts to diversify the state's economy.

“And, do you think that raising new taxes or fees on businesses will harm Nevada’s attempt to diversify the economy and attract new businesses to the state, or do you think that raising taxes or fees will have little impact on the state’s ability to attract new industries?”



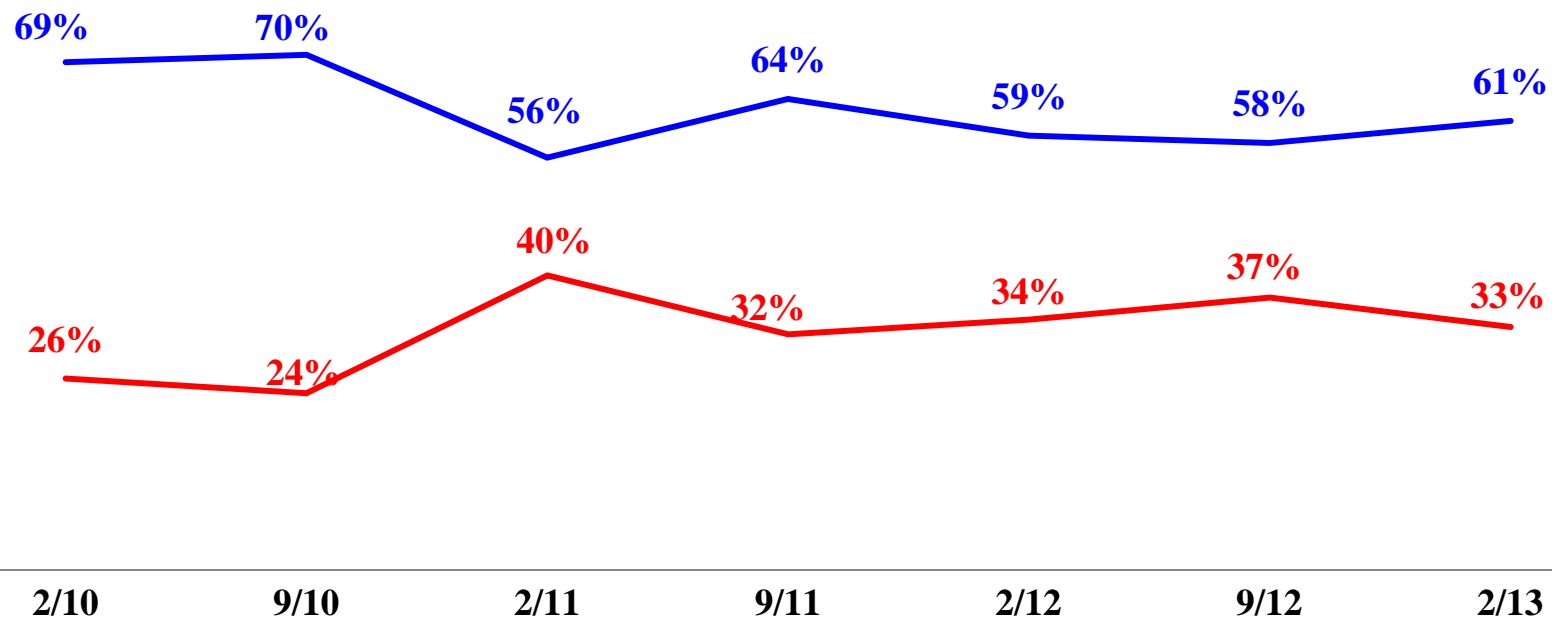
There has been no change in attitudes on this issue: Nevada voters would opt to have their taxes raised rather than cut spending.

“As you may know, Nevada’s constitution requires that the state operate on a balanced budget. If state revenues fall, would you rather the Governor and State Legislature CUT SPENDING for government services such as education and health care, or RAISE YOUR TAXES to avoid these cuts?”



Nevadans continue to believe that additional spending cuts can be absorbed by trimming waste, fraud, and abuse.

“Do you believe that spending cuts in Nevada’s state budget can be absorbed by trimming waste, fraud, and abuse in the state budget and through government reorganization, or do you believe that additional spending cuts will hurt important programs?”



— Additional Spending Cuts Can be Absorbed — Additional Spending Cuts Will Hurt Important Programs

Nevada voters remain divided over the effectiveness of the state's tax system.

“Thinking some more about Nevada’s tax system...”

	<u>5/09</u>	<u>2/10</u>	<u>9/10</u>	<u>2/11</u>	<u>9/11</u>	<u>2/12</u>	<u>9/12</u>
Works Well:	56%	48%	50%	46%	47%	50%	45%
Needs to Change:	39%	43%	40%	48%	45%	46%	47%

50%

Some people say that Nevada’s tax system generally works well. They say times are unusually hard across the country, as most other states have major budget problems too. Making all businesses pay more in taxes will only end up increasing the state’s unemployment rate and budget shortfall.

...while...

47%

Other people say that Nevada needs to significantly change its tax system to become less dependent on gaming and sales taxes and more stable because other businesses would pay more. They say every time there is a downturn in the national economy, the casinos are hurt and consumers spend less money, which ends up hurting the state budget.

A strong majority of Nevada voters believe that changes to the tax system should not include any tax increases.

“As you may know, some people are talking about changing Nevada’s tax system. If the tax system is changed, do you think that the changes should...”

61%

Not include any tax increases because people and businesses cannot afford increased taxes while the economic recovery is so fragile.

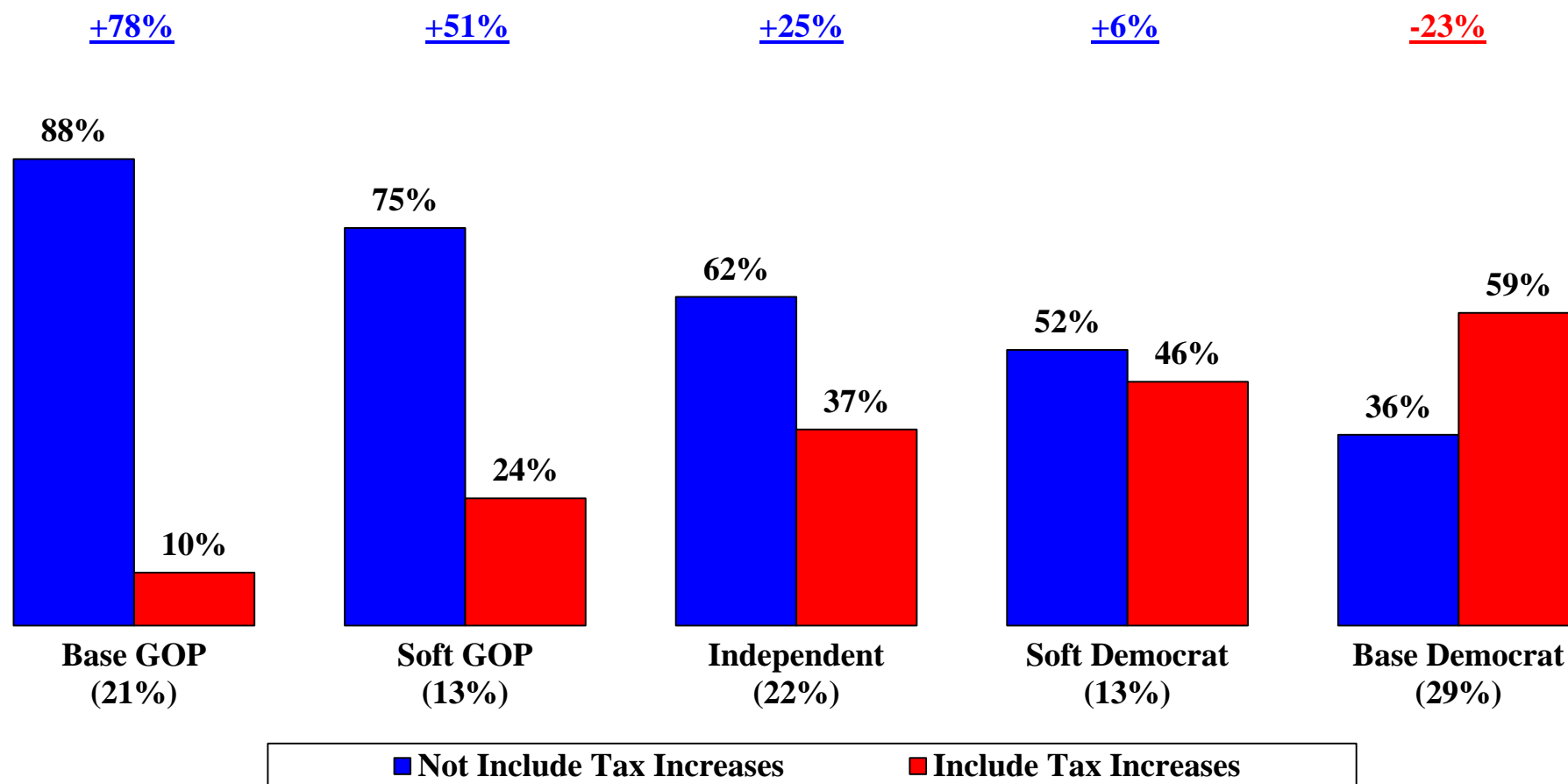
...or...

37%

Include tax increases because the state needs the additional revenue because the budgets for many important state services were cut during the recession.

GOPers, Inds, and soft Democrats believe any changes should not include tax increases. Base Democrats favor the inclusion of tax increases.

By Party

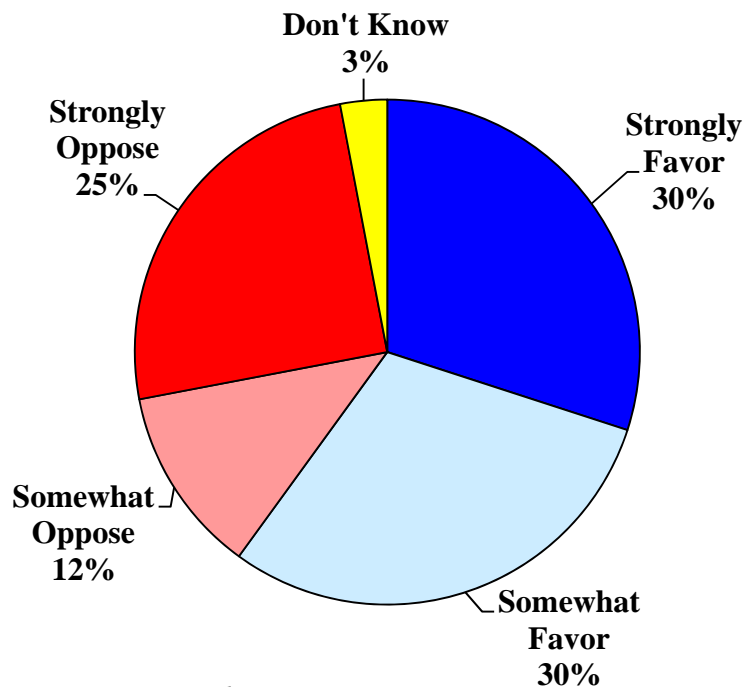


Voters across party lines support collecting the Amazon tax early.

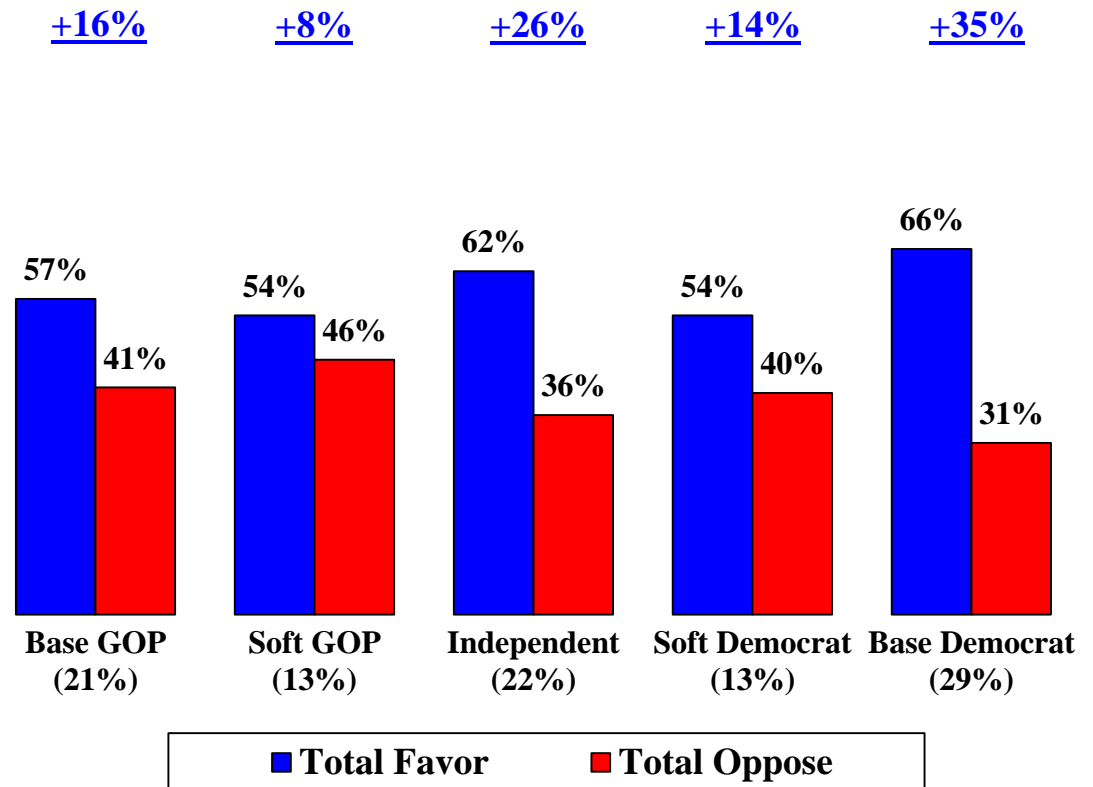
“Still thinking about taxes, as you may know, Amazon is scheduled to begin collecting sales taxes on online purchases made in Nevada in 2014. Would you favor or oppose the state starting such a requirement on all online retailers six months earlier in order to increase the state and local tax revenues in 2013 by about \$150 million?”

Overall

Total Favor: 59%*
Total Oppose: 38%*



By Party



*Denotes Rounding



The Margin Tax

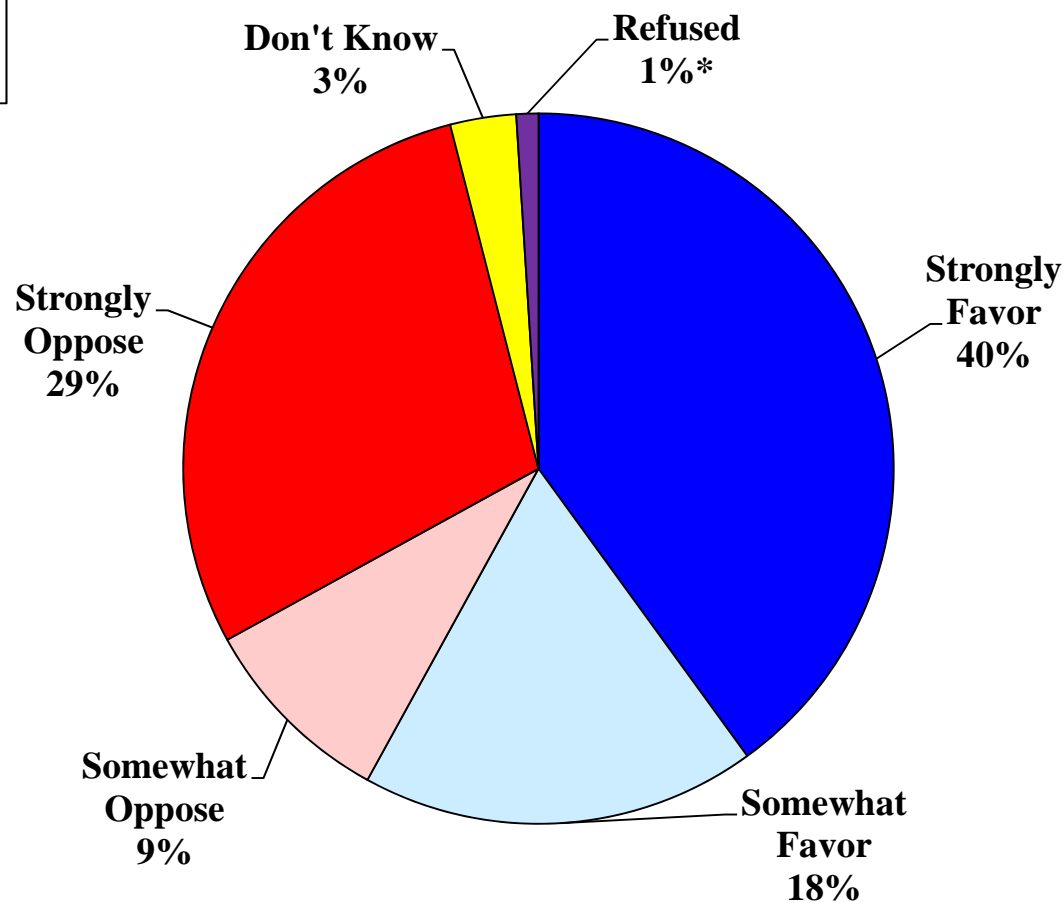


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Nevadans strongly favor the Education Initiative's margin tax.

“Would you favor or oppose a ballot question called the Education Initiative that would create an additional two percent tax, called a margin tax, on all non-gaming businesses whose net revenue exceeds one million dollars, with all tax revenues being used to fund education?”

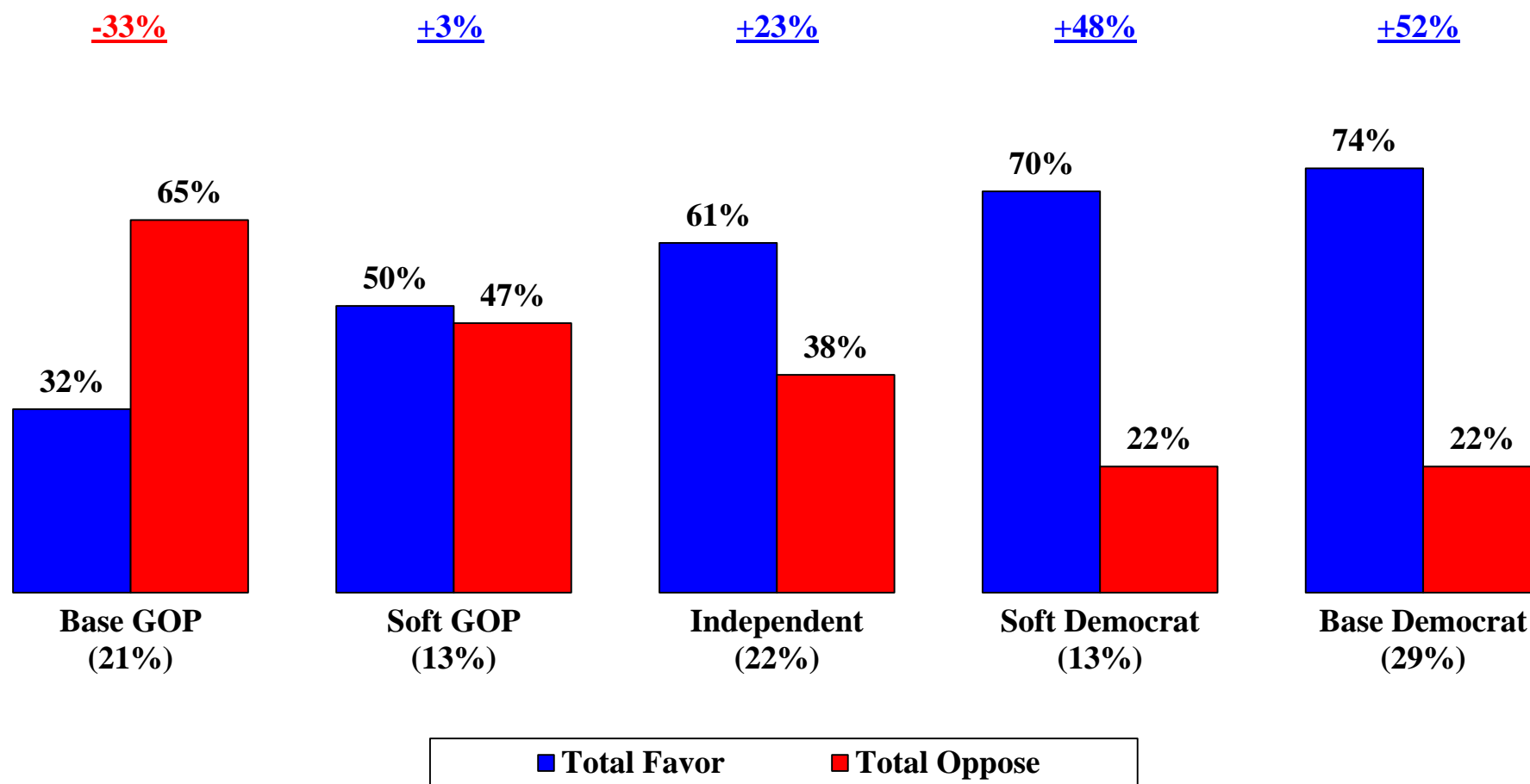
Total Favor: 58%
Total Oppose: 39%*



**Denotes Rounding*

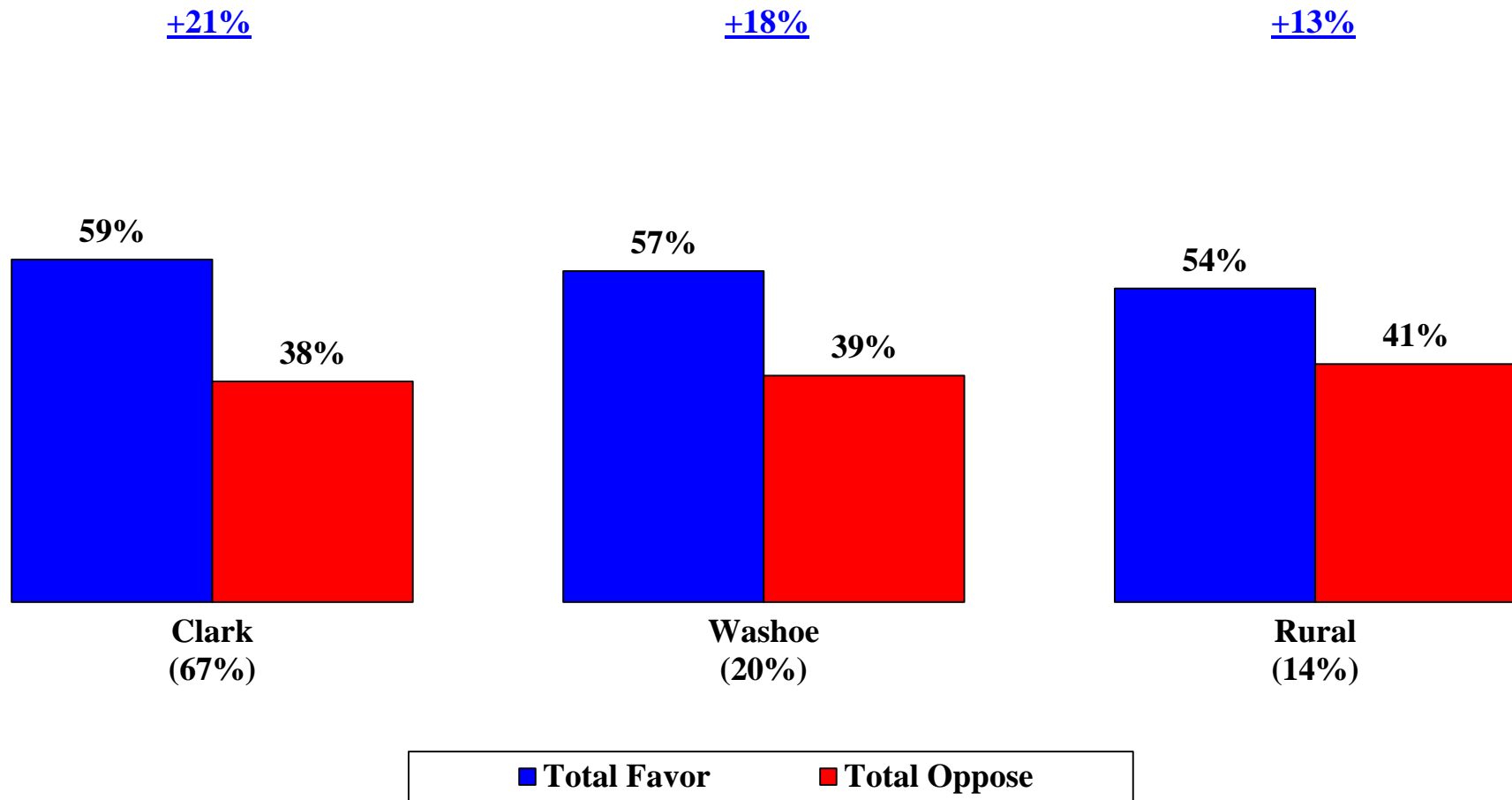
Only base GOPers oppose the margin tax.

Education Initiative Ballot by Party



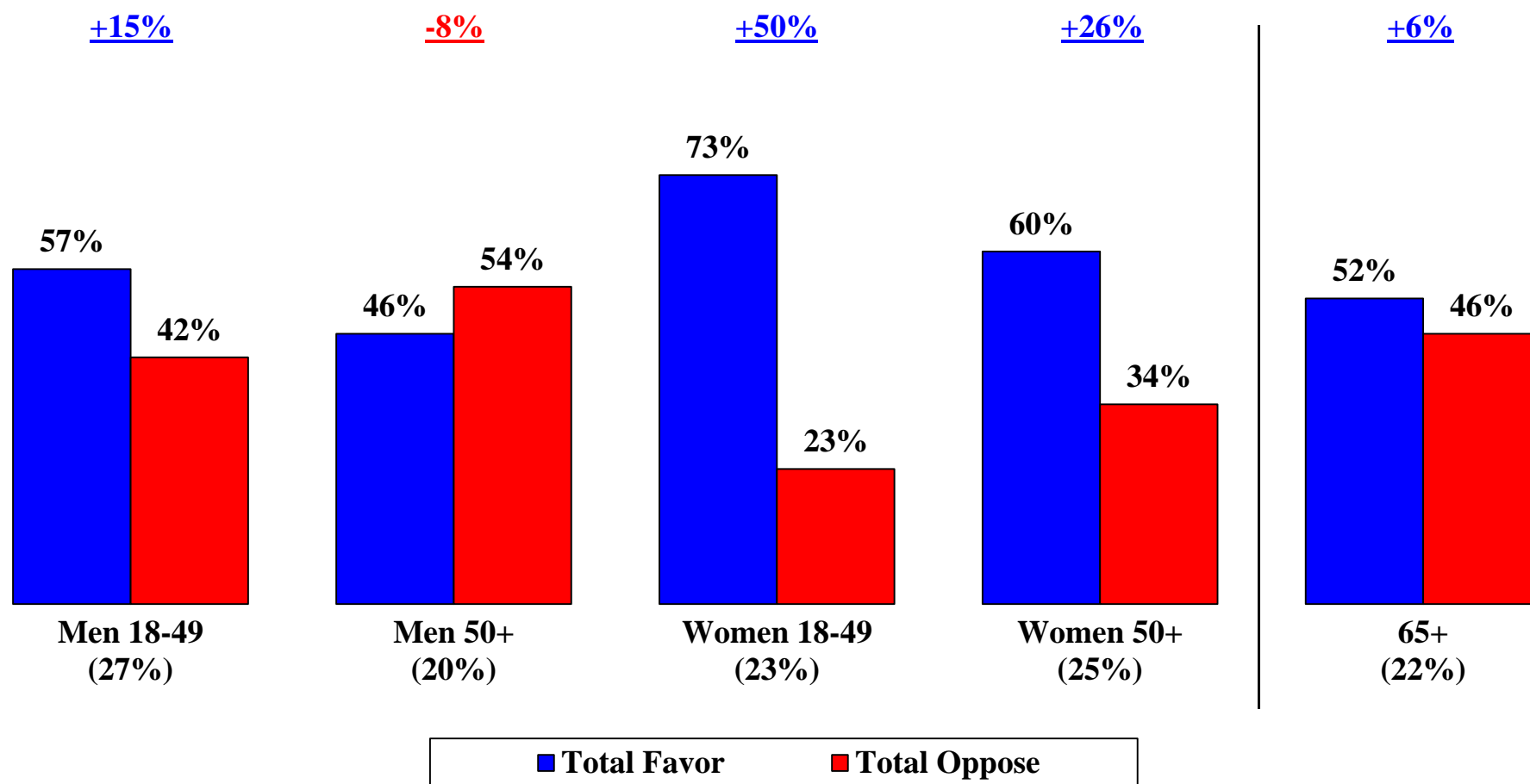
Voters across all regions back the margin tax.

Education Initiative Ballot by Region



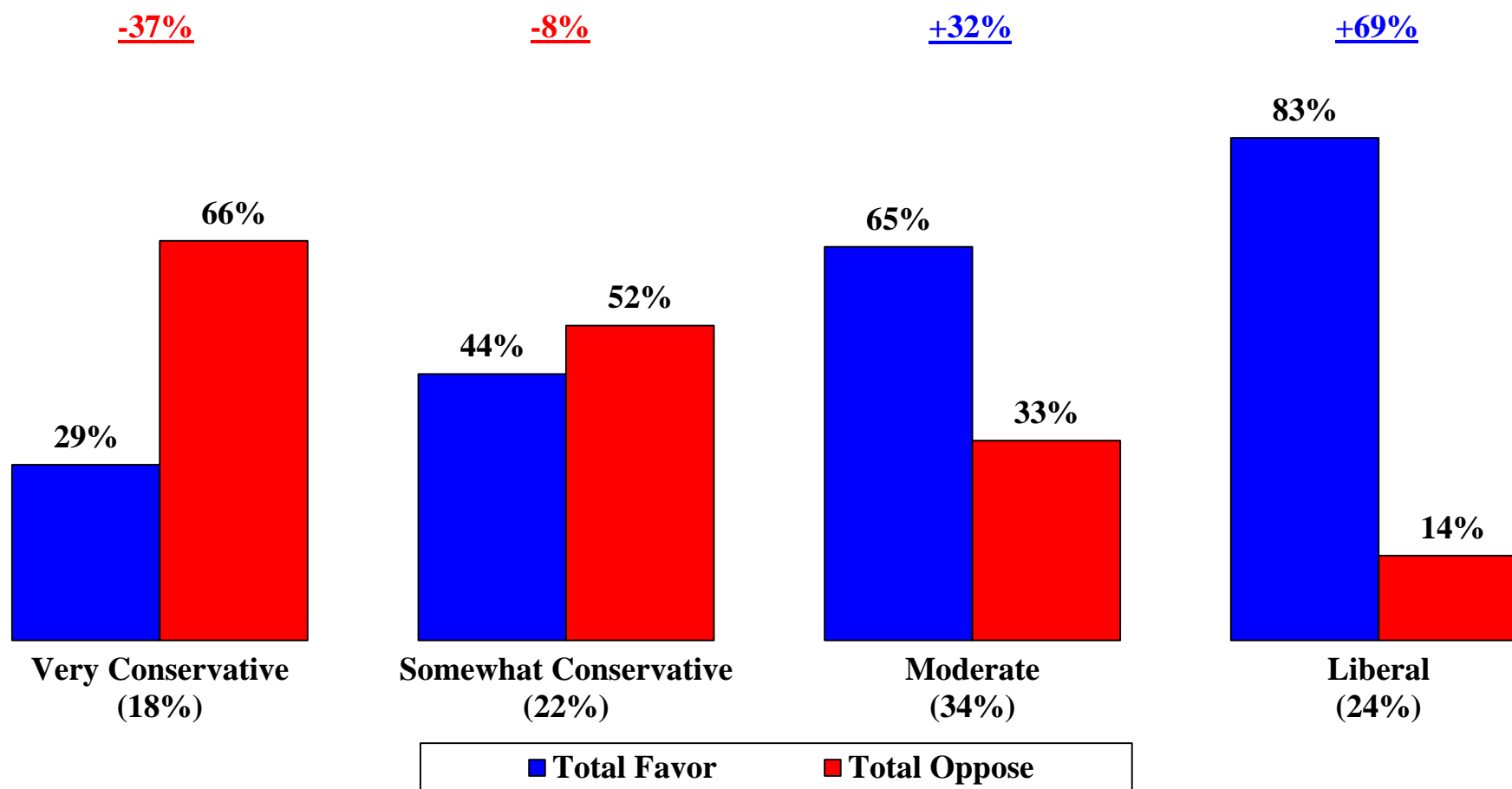
Older men oppose the initiative, while all other gender/age groups and seniors support it.

Education Initiative Ballot by Gender/Age + Seniors



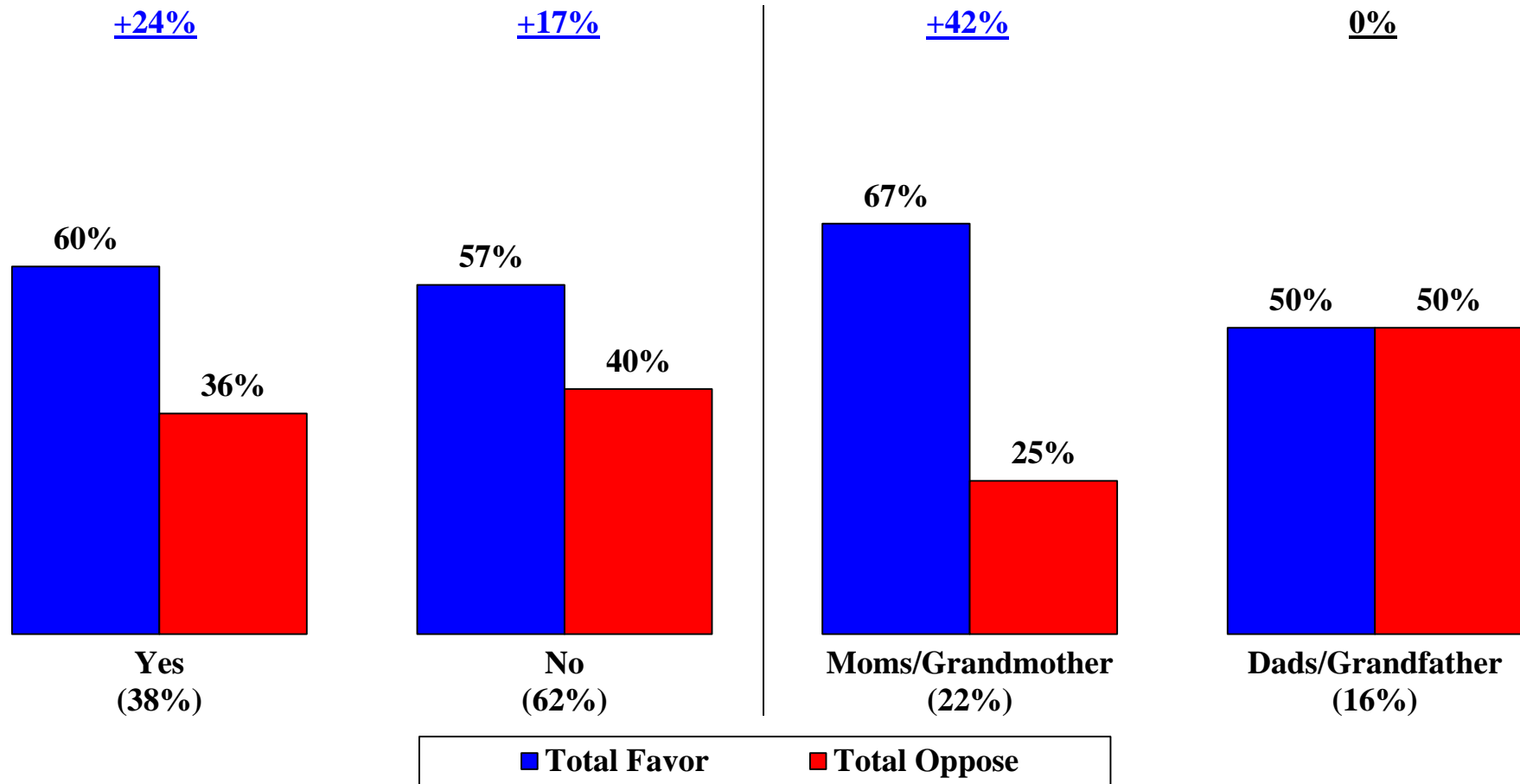
Conservatives largely oppose the margin tax, while moderates and liberals strongly support it.

Education Initiative Ballot by Ideology



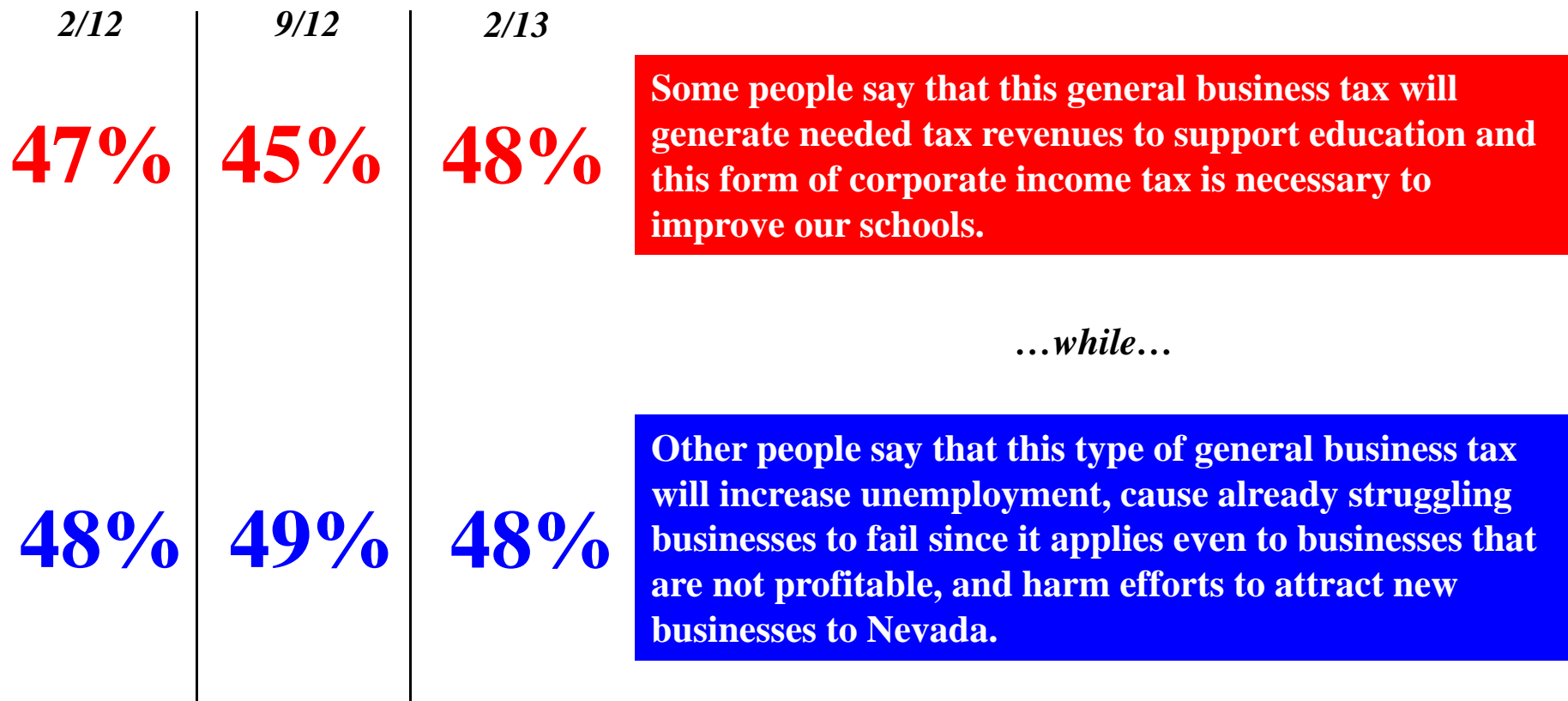
**Both parents and non-parents support this initiative.
Moms/grandmothers strongly back it, while
dads/grandfathers are evenly split.**

Education Initiative Ballot by Kids/Grandkids



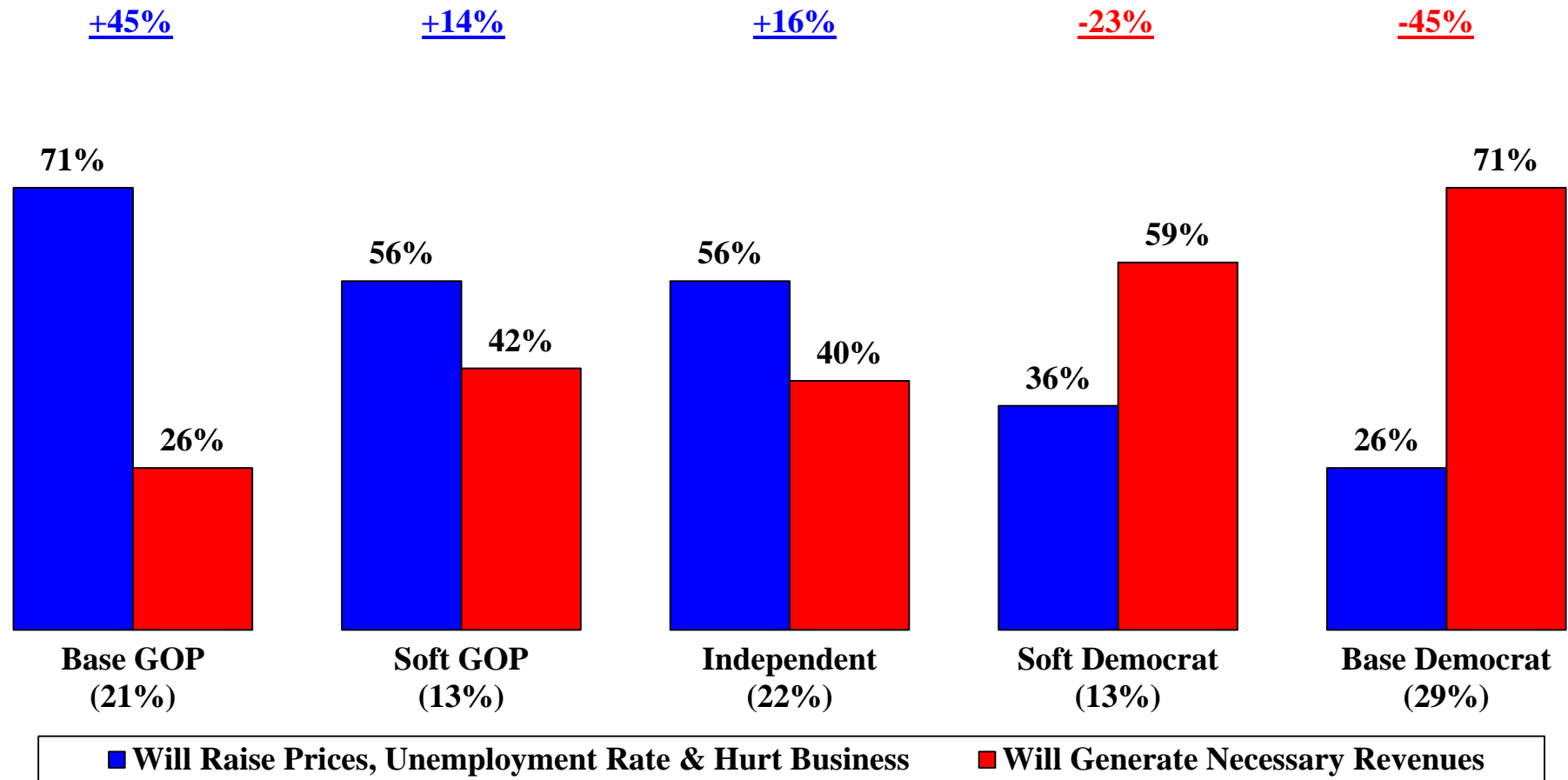
Nevadans remain divided on the potential impact of the margin tax.

“Still thinking about this proposal, I am going to read you two statements about the proposal. After I read each statement, please tell me which one comes closest to your own opinion...”



Base partisans are mirror opposites; Independents believe the margin tax will raise prices and the unemployment rate and will hurt business.

By Party



A majority of voters say they agree with the opponents of the margin tax.

“Continuing to think about the margin tax proposal, I am going to read you what supporters of the margin tax are saying and what opponents of it are saying. After I read each statement, please tell me who you most agree with...”

44%

Supporters of the margin tax say that adding a tax on businesses will not increase prices and note that large retail store prices in Nevada are not lower than in other states that already do tax businesses.

...while...

52%

Opponents of the margin tax say that adding a tax on businesses impacts more than product pricing and that businesses make a number of decisions, including expanding, hiring, and wage decisions, based on their total costs of operations, including taxes and local competition.

Top Groups

Top Groups, Supporters (44%)

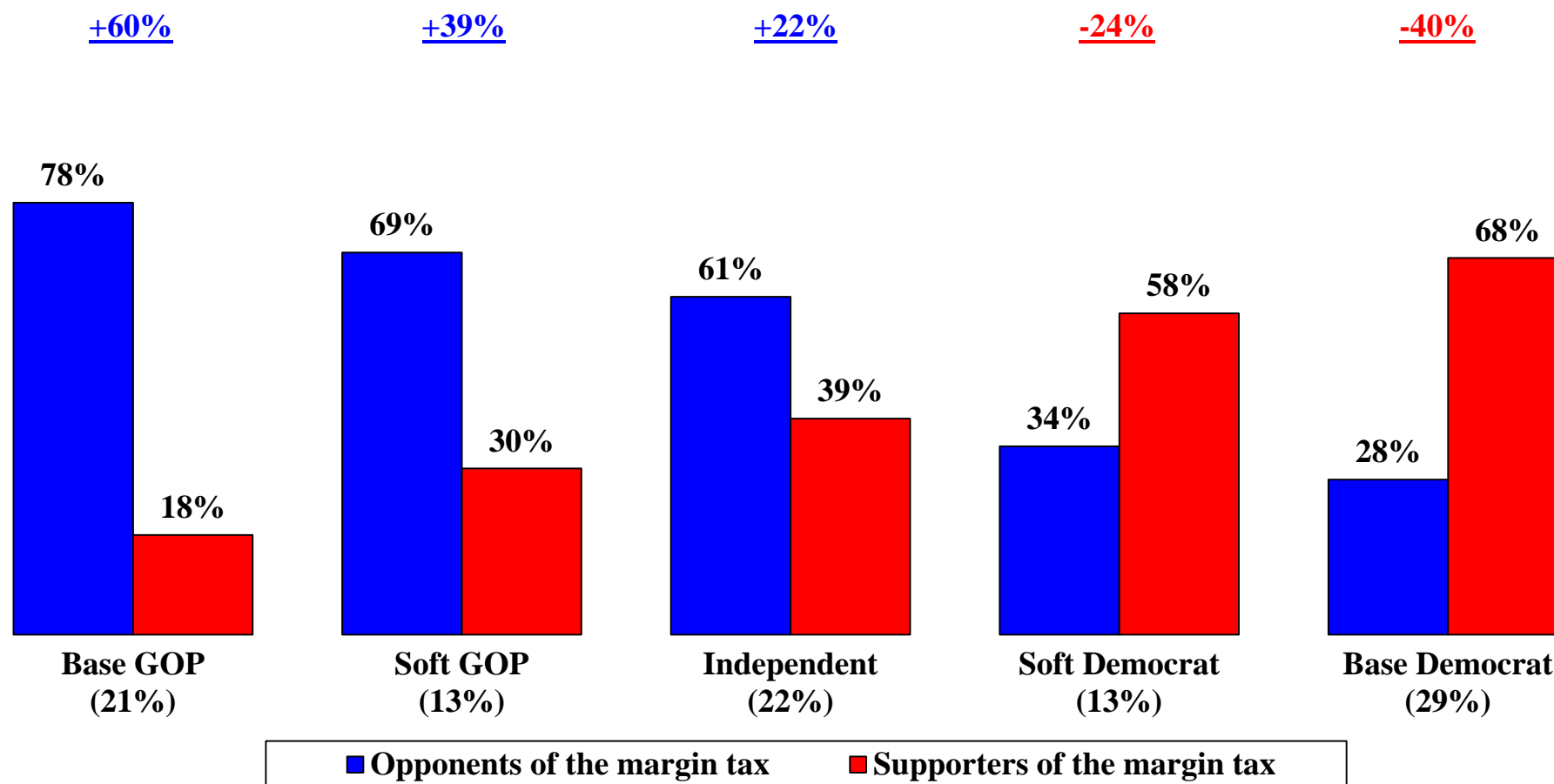
Democratic Women	69%
Base Democrat	68%
Liberal	67%
Teachers Association	64%
Total Unfavorable/Tea Party	62%
Women w/ Degrees	61%
Democratic Men	61%
Hispanics	61%
Soft Democrat	58%
Government Employee	57%

Top Groups, Opponents (52%)

Strongly Favorable/Tea Party	86%
Very Conservative	83%
Somewhat Favorable/Tea Party	80%
Base GOP	78%
GOP Men	78%
GOP Women	72%
Men 50+	71%
Soft GOP	69%
Somewhat Conservative	64%
Independent Men	63%

GOPers and Independents agree with opponents of the margin tax, while Dems agree with its supporters.

By Party





Appeals Court

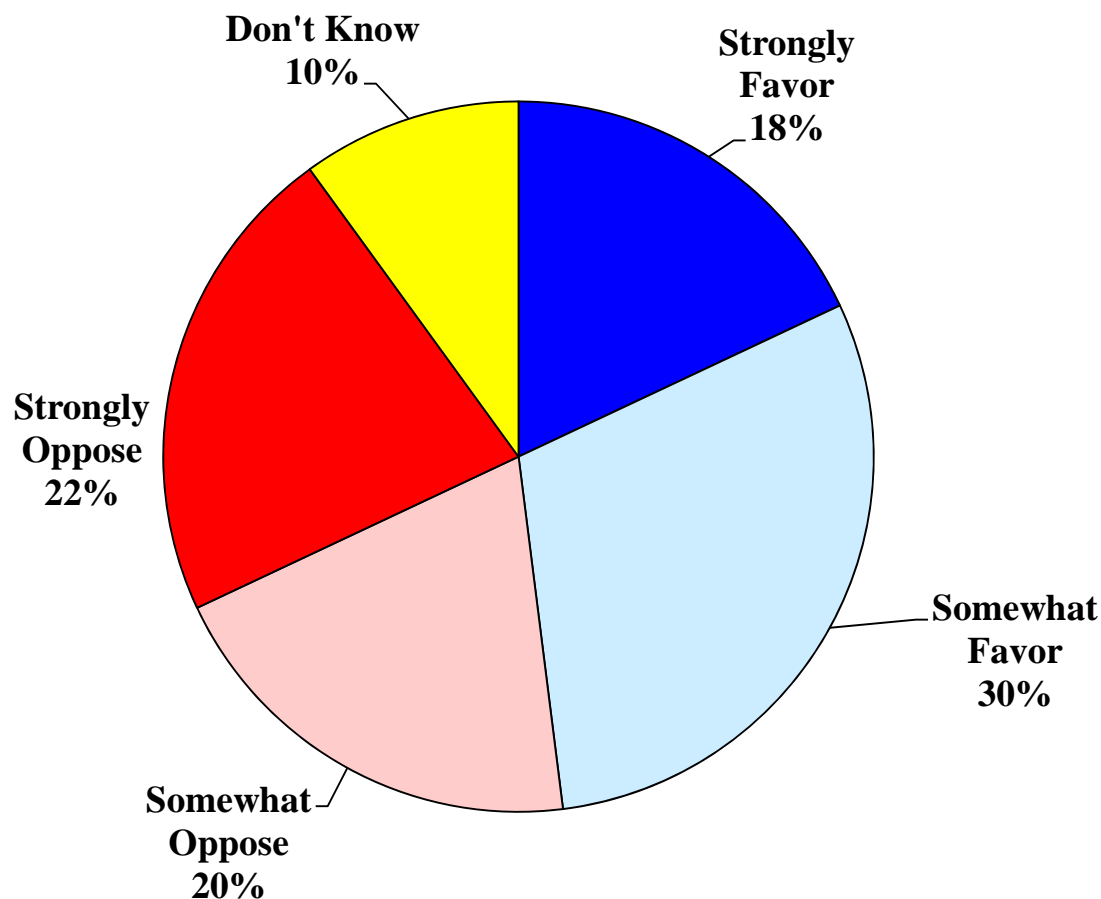


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A plurality of voters support the creation of an appeals court in Nevada.

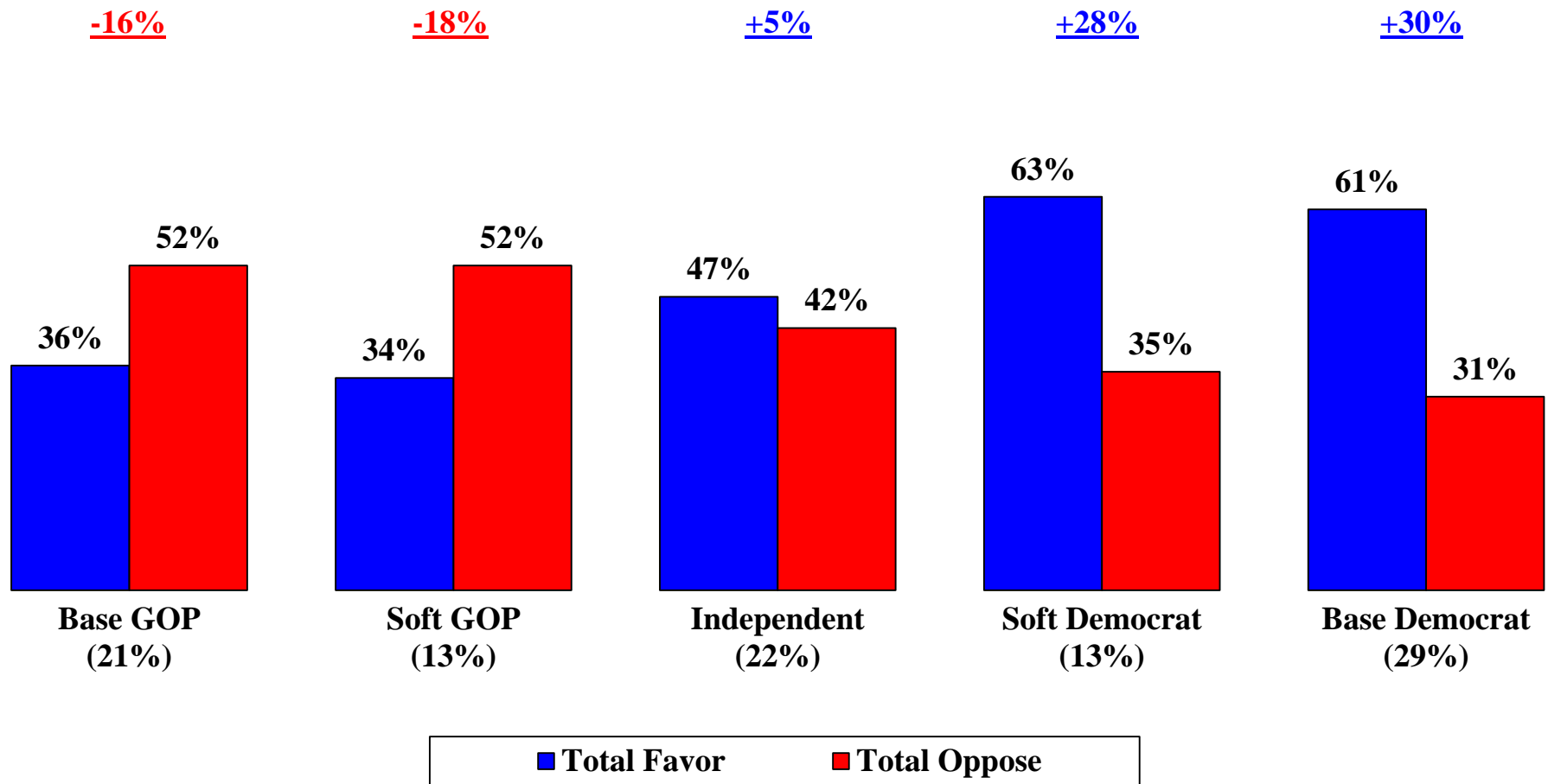
“As you may know, the Nevada Legislature may place a question on the ballot in 2014 concerning whether Nevada should add an appeals court to its court system. Currently, appeals of District Court decisions are made directly to the Nevada Supreme Court. Would you favor or oppose the creation of an appeals court?”

Total Favor:	48%
Total Oppose:	42%



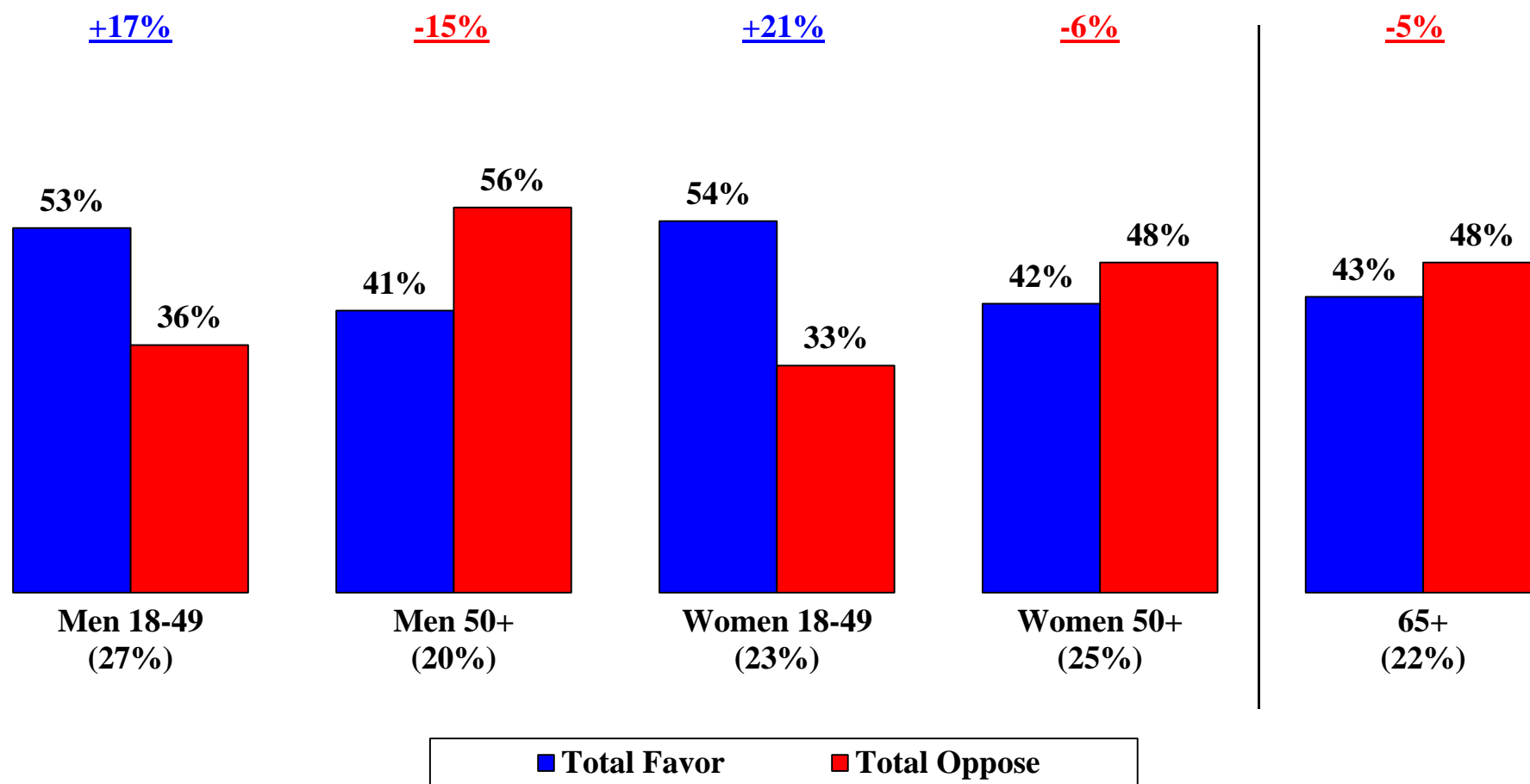
Democrats back the creation of an appeals court; Independents are divided, and GOPers are opposed.

By Party



Younger voters support the creation of an appeals court, while older voters largely do not.

By Gender/Age + Seniors





Minimum Wage

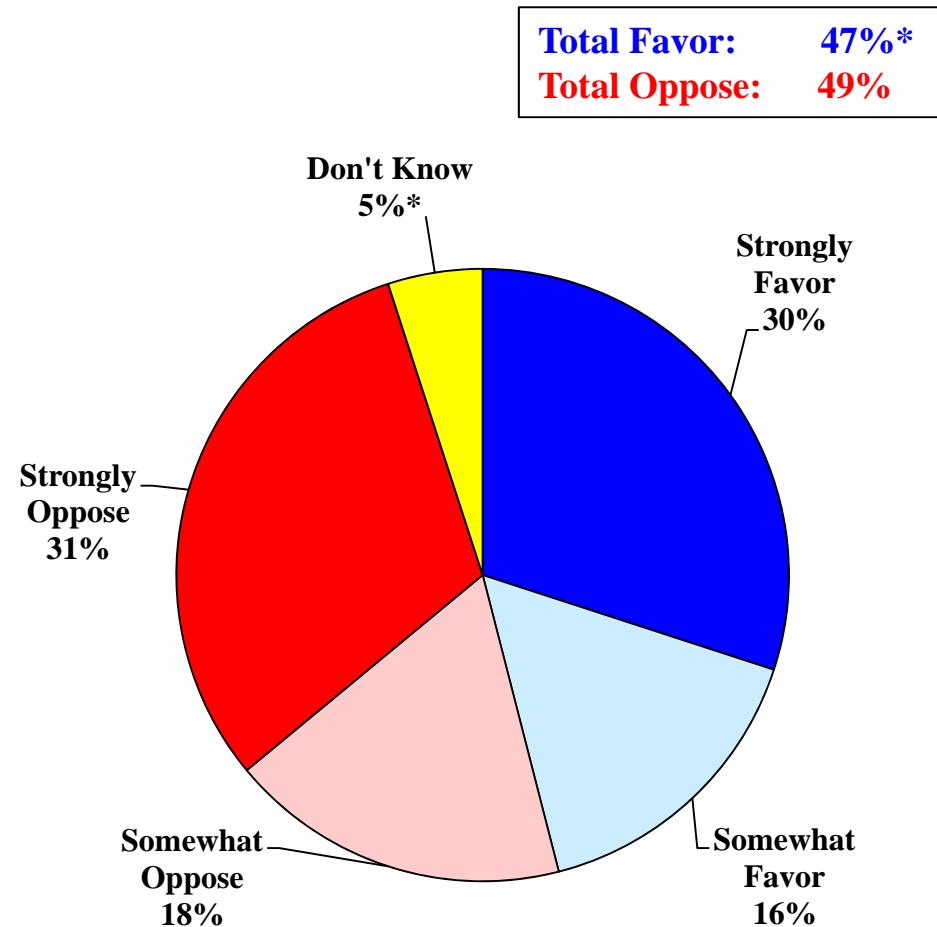


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Voters are divided over whether some Nevada employers should have to pay a higher minimum wage.

“Changing topics...”

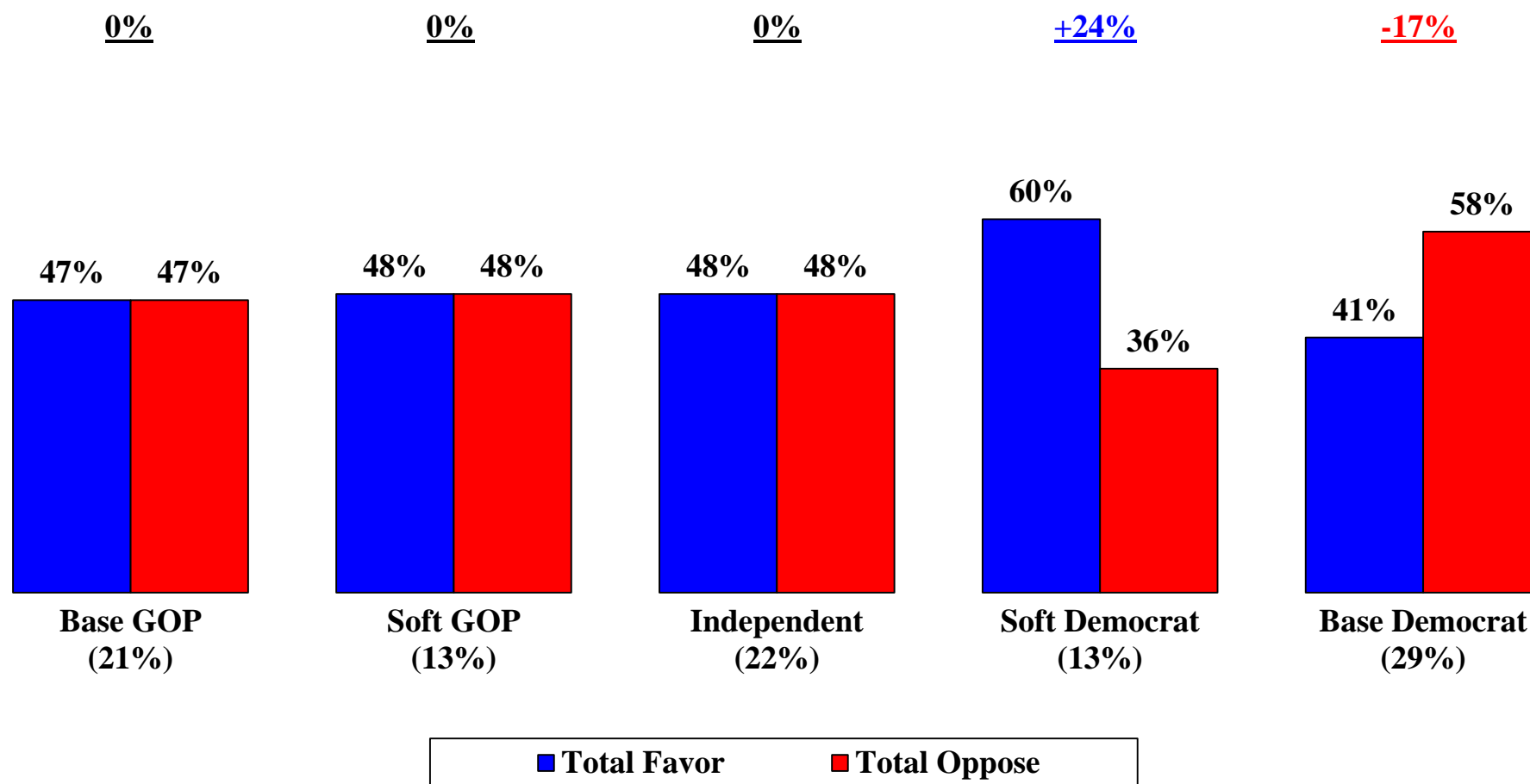
As you may know, Nevada law requires that employees who do not provide health insurance coverage pay a minimum wage that is one dollar higher than the federal minimum wage. Currently, there is a proposal to increase the federal minimum wage to nine dollars an hour, which would increase the minimum in Nevada to ten dollars an hour for Nevada employers who do not provide health insurance coverage. Do you favor or oppose changing Nevada law to eliminate this requirement that some Nevada employers pay a higher minimum wage?



**Denotes Rounding*

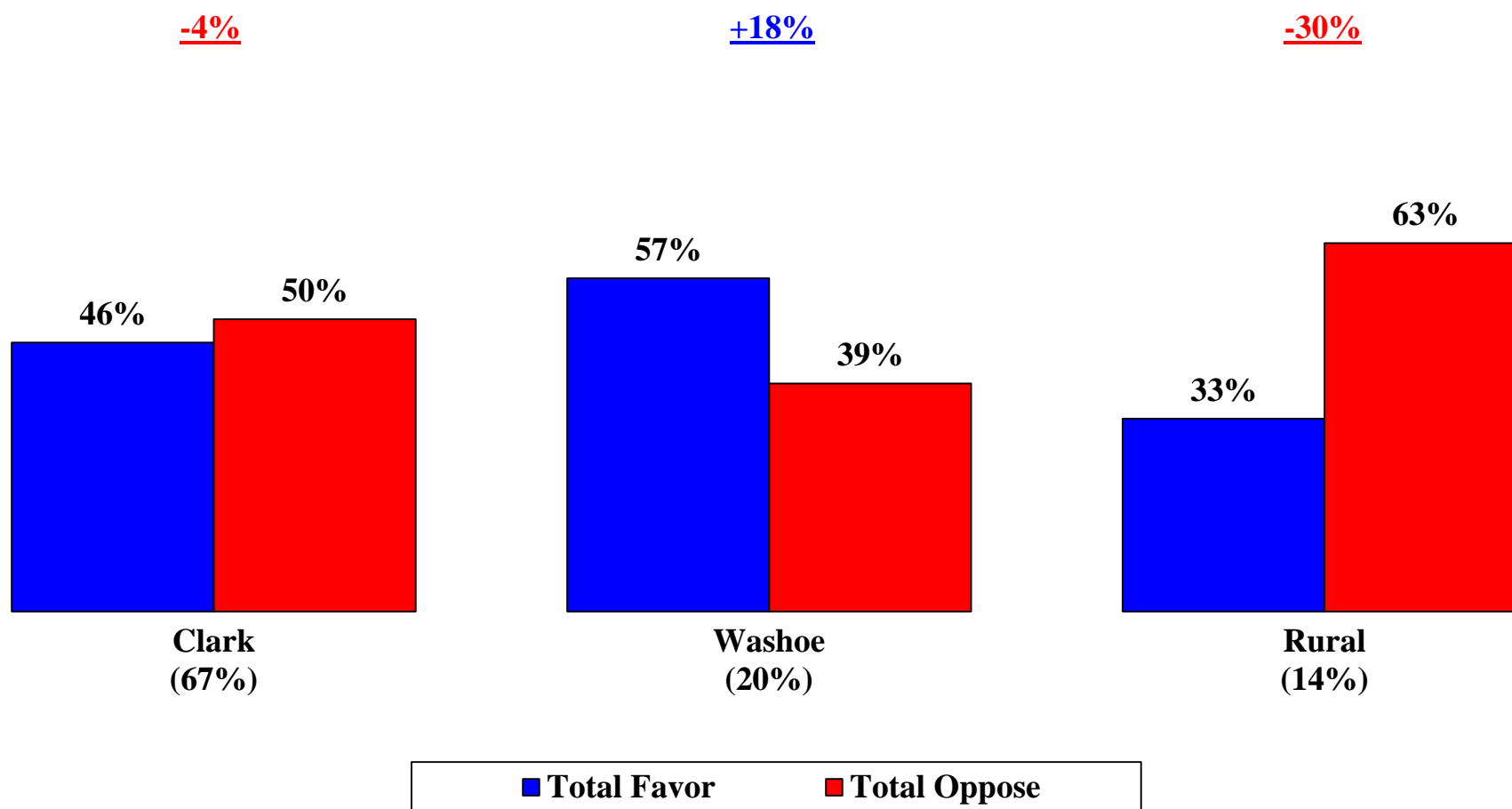
Split decision: GOPers and Independents are divided on the minimum wage proposal, and soft Democrats have broken ranks with base Democrats.

Minimum Wage by Party



Only voters in Washoe County support eliminating the higher minimum wage requirement. Clark County is divided.

Minimum Wage by Region

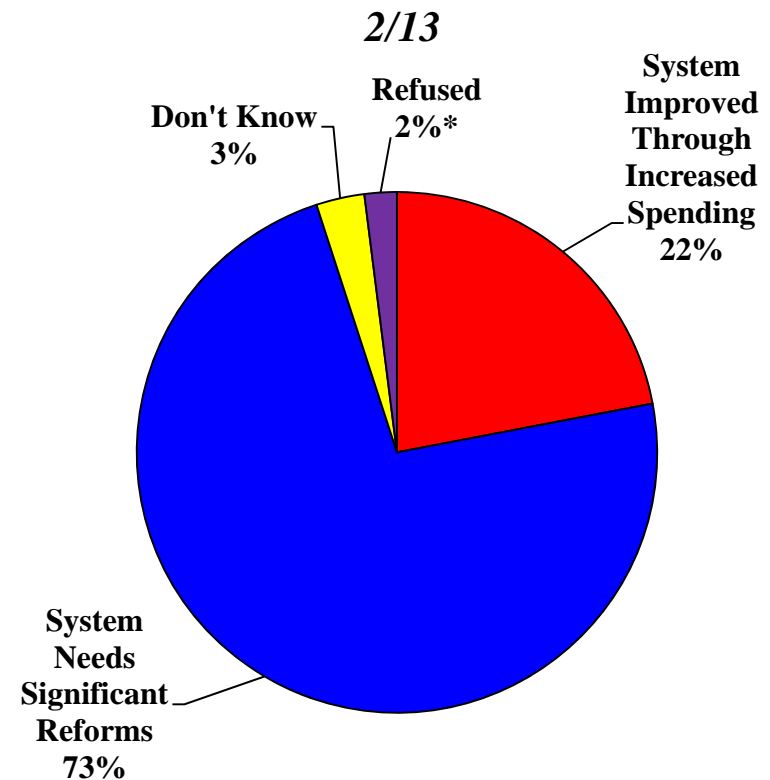
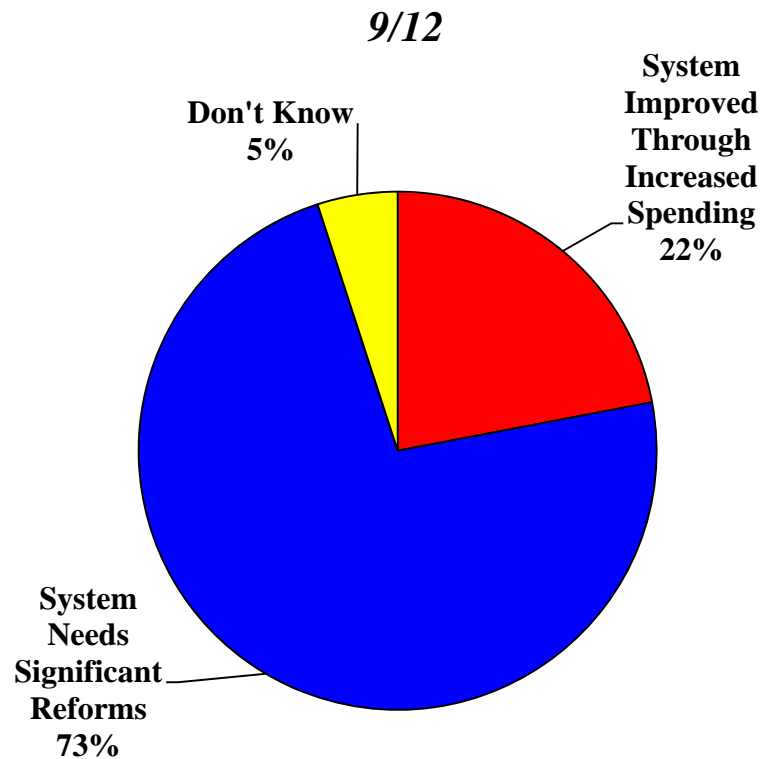




Other Issues

There has been no change since September: Nevadans continue to believe that the education system needs reforms.

“Thinking now about education, Nevada’s education system has below average graduation rates and has below average scores on standardized tests. Do you think that EITHER the school system can be improved through increased spending OR do you believe that the system needs significant reforms in order to improve results?”

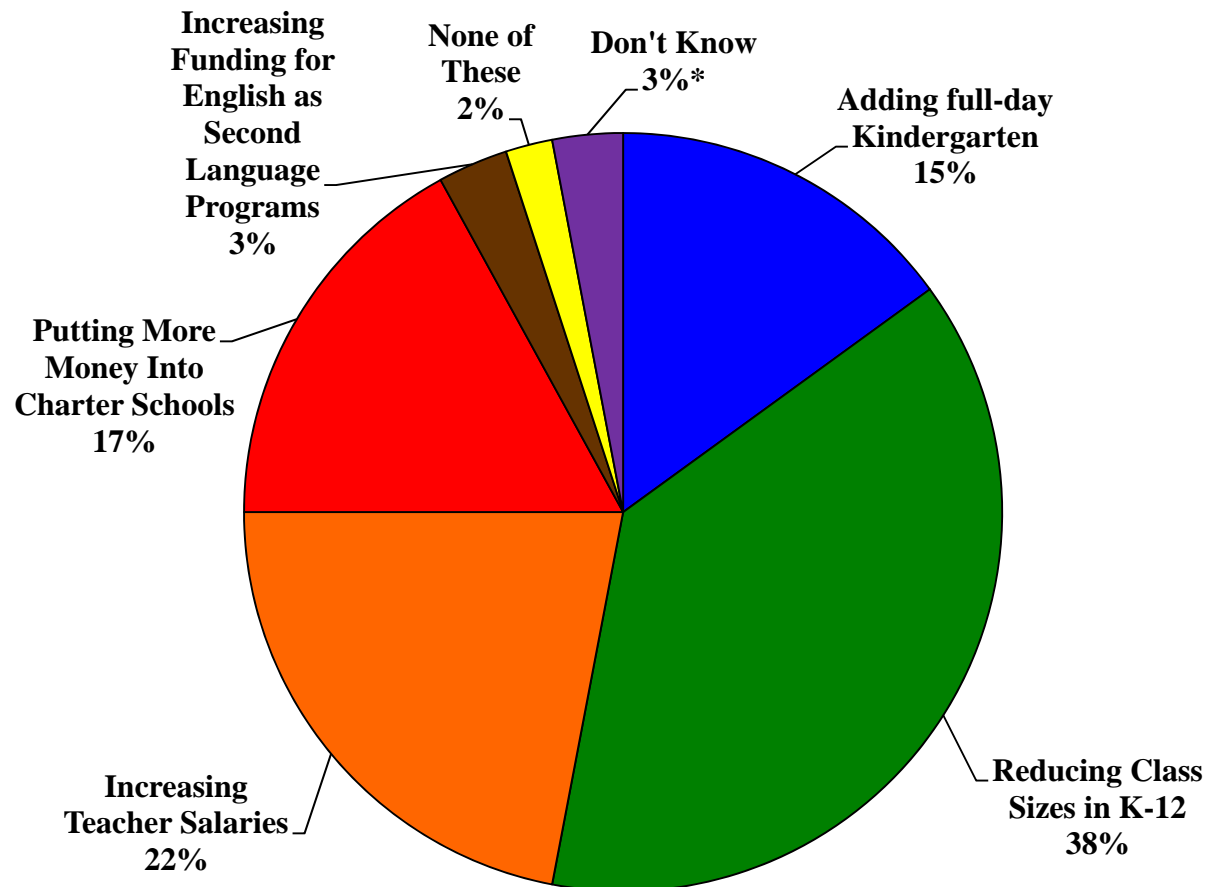


^In September’s survey, the question was worded, “Do you think that the school system can be improved through increased spending or do you also believe that the system needs significant reforms in order to improve results?”

**Denotes Rounding*

A plurality of voters believe that reducing K-12 class sizes should be the most important priority for funding.

“As the state legislature considers how to allocate new funding for education, which of the following do you believe should be the MOST important priority for funding?”



**Denotes Rounding*

Voters across the partisan spectrum believe reducing class sizes should be the most important priority for funding.

By Party

Base GOP (21%)	Soft GOP (13%)	Lean/Ind (22%)	Soft Democrat (13%)	Base Democrat (29%)
Reducing Class Sizes (30%)	Reducing Class Sizes (32%)	Reducing Class Sizes (35%)	Reducing Class Sizes (47%)	Reducing Class Sizes (45%)
Putting More Money into Creating Charter Schools (28%)	Putting More Money into Creating Charter Schools (31%)	Increasing Teacher Salaries (24%)	Adding Full-Day Kindergarten for all Public Schools (21%)	Increasing Teacher Salaries (24%)
Increasing Teacher Salaries (24%)	Increasing Teacher Salaries (21%)	Adding Full-Day Kindergarten for all Public Schools (19%)	Increasing Teacher Salaries (18%)	Adding Full-Day Kindergarten for all Public Schools (17%)
Adding Full-Day Kindergarten for all Public Schools (8%)	Adding Full-Day Kindergarten for all Public Schools (12%)	Putting More Money into Creating Charter Schools (14%)	Putting More Money into Creating Charter Schools (13%)	Putting More Money into Creating Charter Schools (6%)
Increasing Funding for English as Second Language Programs (5%)	Increasing Funding for English as Second Language Programs (0%)	Increasing Funding for English as Second Language Programs (3%)	Increasing Funding for English as Second Language Programs (0%)	Increasing Funding for English as Second Language Programs (6%)

Among parents, reducing class sizes and adding full-day Kindergarten are the top funding priorities.

By Kids/Grandkids

Yes (38%)	No (62%)	Moms/ Grandmother (22%)	Dads/ Grandfather (16%)
Reducing Class Sizes (39%)	Reducing Class Sizes (38%)	Reducing Class Sizes (43%)	Reducing Class Sizes (33%)
Adding Full-Day Kindergarten for all Public Schools (26%)	Increasing Teacher Salaries (26%)	Adding Full-Day Kindergarten for all Public Schools (25%)	Adding Full-Day Kindergarten for all Public Schools (27%)
Increasing Teacher Salaries (17%)	Putting More Money into Creating Charter Schools (19%)	Increasing Teacher Salaries (14%)	Increasing Teacher Salaries (20%)
Putting More Money into Creating Charter Schools (13%)	Adding Full-Day Kindergarten for all Public Schools (9%)	Putting More Money into Creating Charter Schools (14%)	Putting More Money into Creating Charter Schools (13%)
Increasing Funding for English as Second Language Programs (2%)	Increasing Funding for English as Second Language Programs (4%)	Increasing Funding for English as Second Language Programs (2%)	Increasing Funding for English as Second Language Programs (3%)

Reducing class sizes in K-12 is a top funding priority for whites, African Americans, and Hispanics.

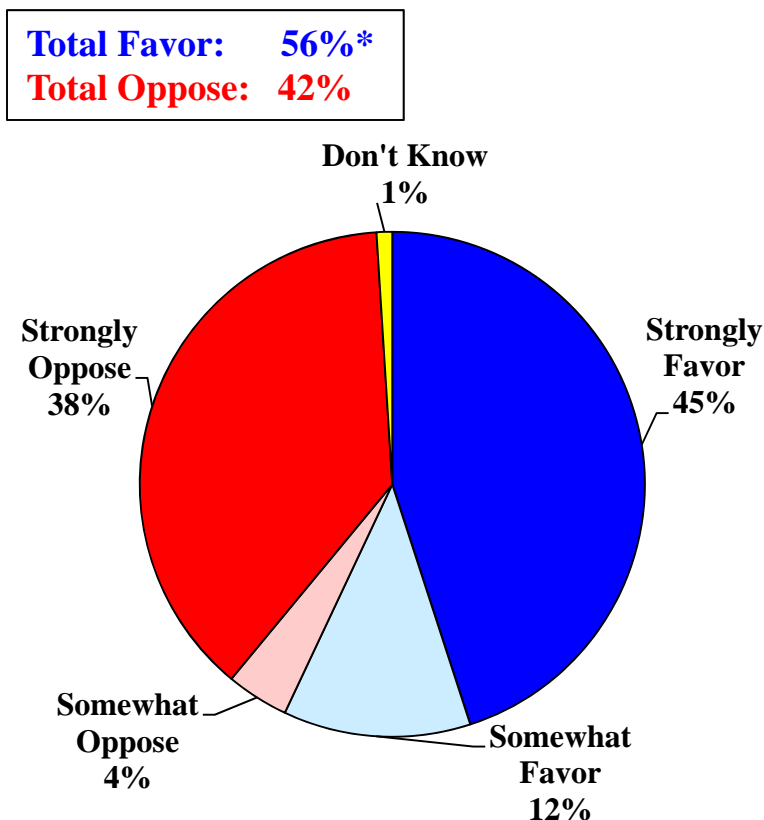
By Ethnicity

White (66%)	African American (9%)	Hispanic (18%)
Reducing Class Sizes (38%)	Increasing Teacher Salaries (30%)	Reducing Class Sizes (42%)
Putting More Money into Creating Charter Schools (20%)	Reducing Class Sizes (30%)	Increasing Teacher Salaries (32%)
Increasing Teacher Salaries (20%)	Adding Full-Day Kindergarten for all Public Schools (25%)	Adding Full-Day Kindergarten for all Public Schools (17%)
Adding Full-Day Kindergarten for all Public Schools (13%)	Putting More Money into Creating Charter Schools (9%)	Putting More Money into Creating Charter Schools (6%)
Increasing Funding for English as Second Language Programs (4%)	Increasing Funding for English as Second Language Programs (7%)	Increasing Funding for English as Second Language Programs (0%)

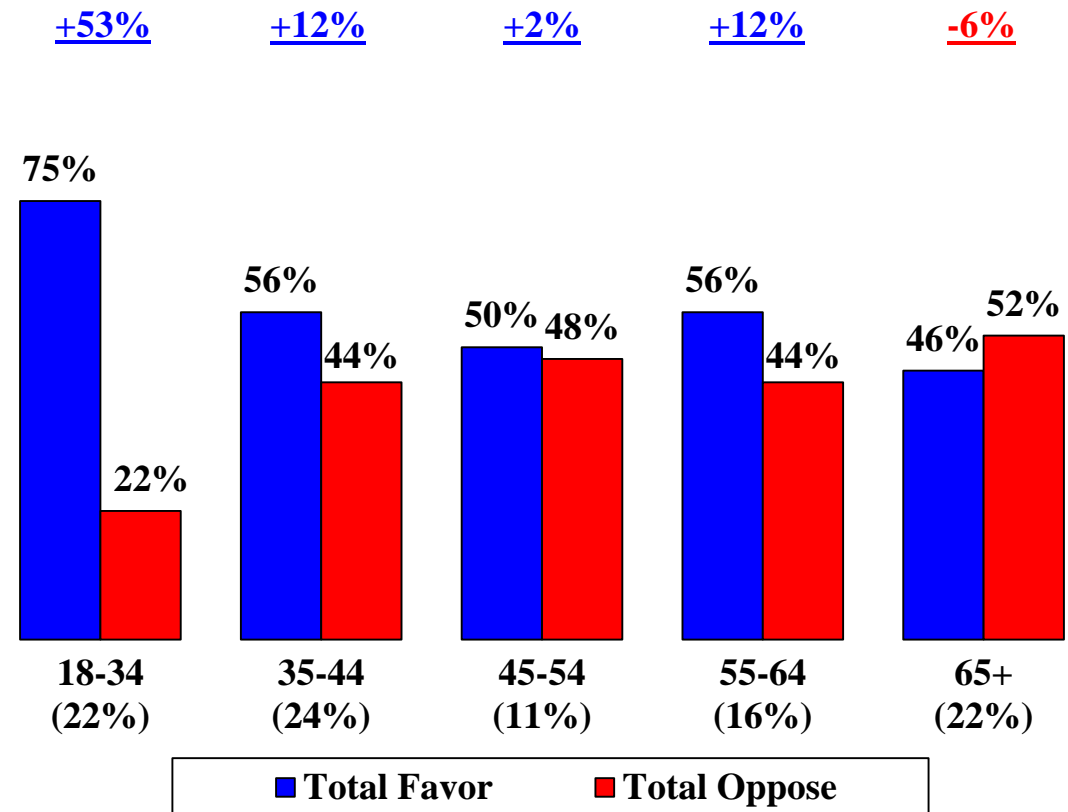
Legalizing marijuana is a generational issue. Younger voters overwhelmingly support it, while only seniors are opposed.

“Turning to a different issue, as you may know, two states legalized the sale of marijuana for recreational use in the elections last November. Would you favor or oppose legalizing the sale of marijuana for recreational use in Nevada if all tax revenue generated from the sale of marijuana was used for educational funding?”

Overall



By Age

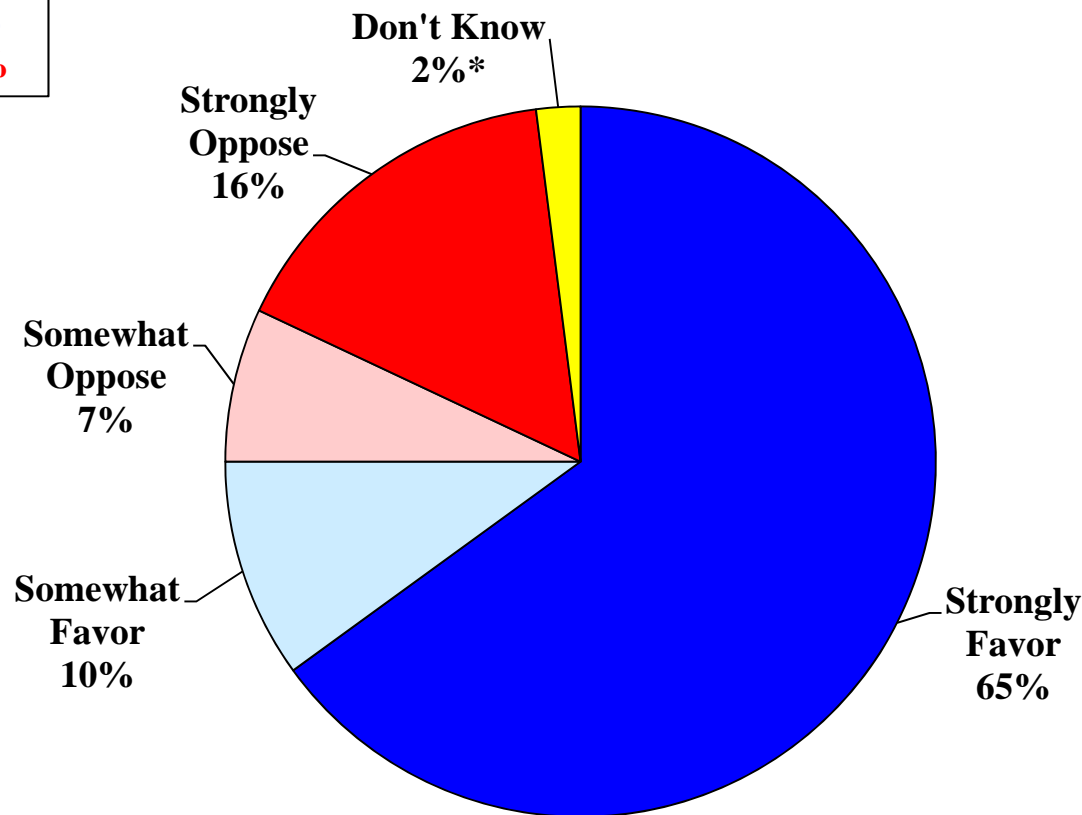


**Denotes Rounding*

Fully three-quarters of Nevada voters support drug testing applicants for welfare benefits.

“Would you favor or oppose Nevada requiring drug tests of people who apply for welfare benefits, even if the benefits are not for them but for their children?”

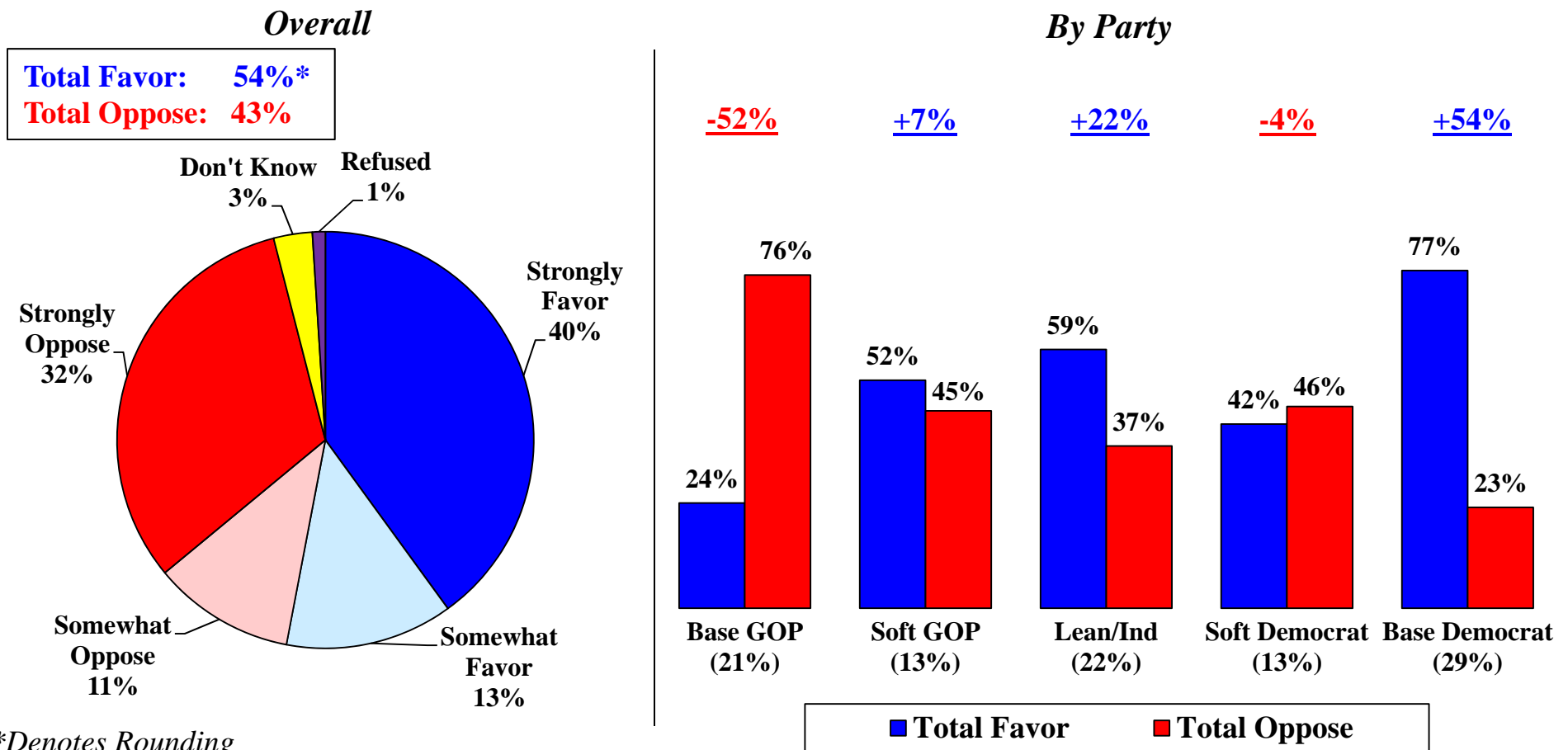
Total Favor: 75%
Total Oppose: 23%



**Denotes Rounding*

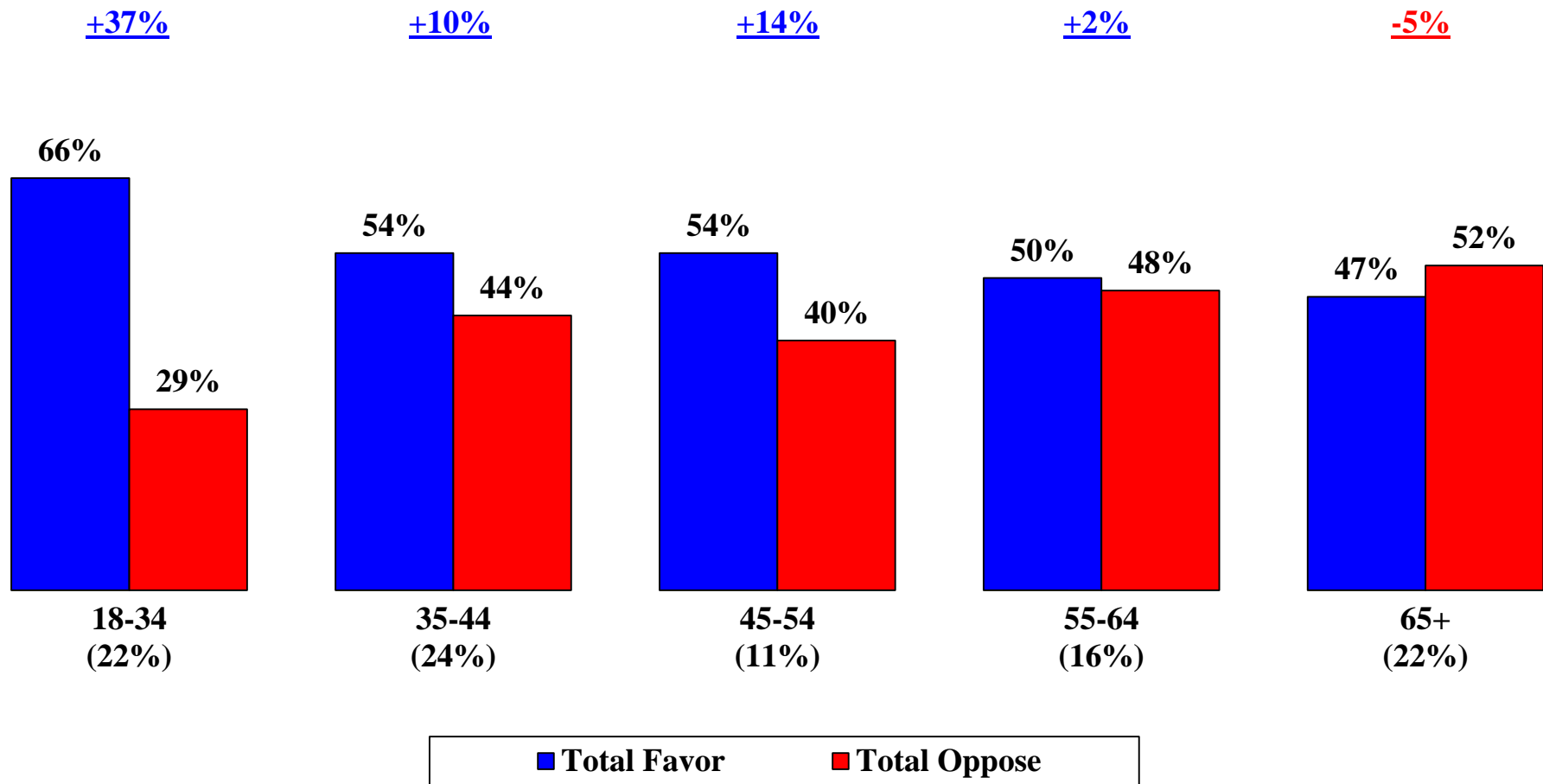
A majority of Nevadans, including Independents, support removing the Protection of Marriage provision.

“Thinking now about something different, would you favor or oppose removing the Protection of Marriage provision from the Nevada Constitution? Removing this provision would allow same-sex couples to legally marry in Nevada...”



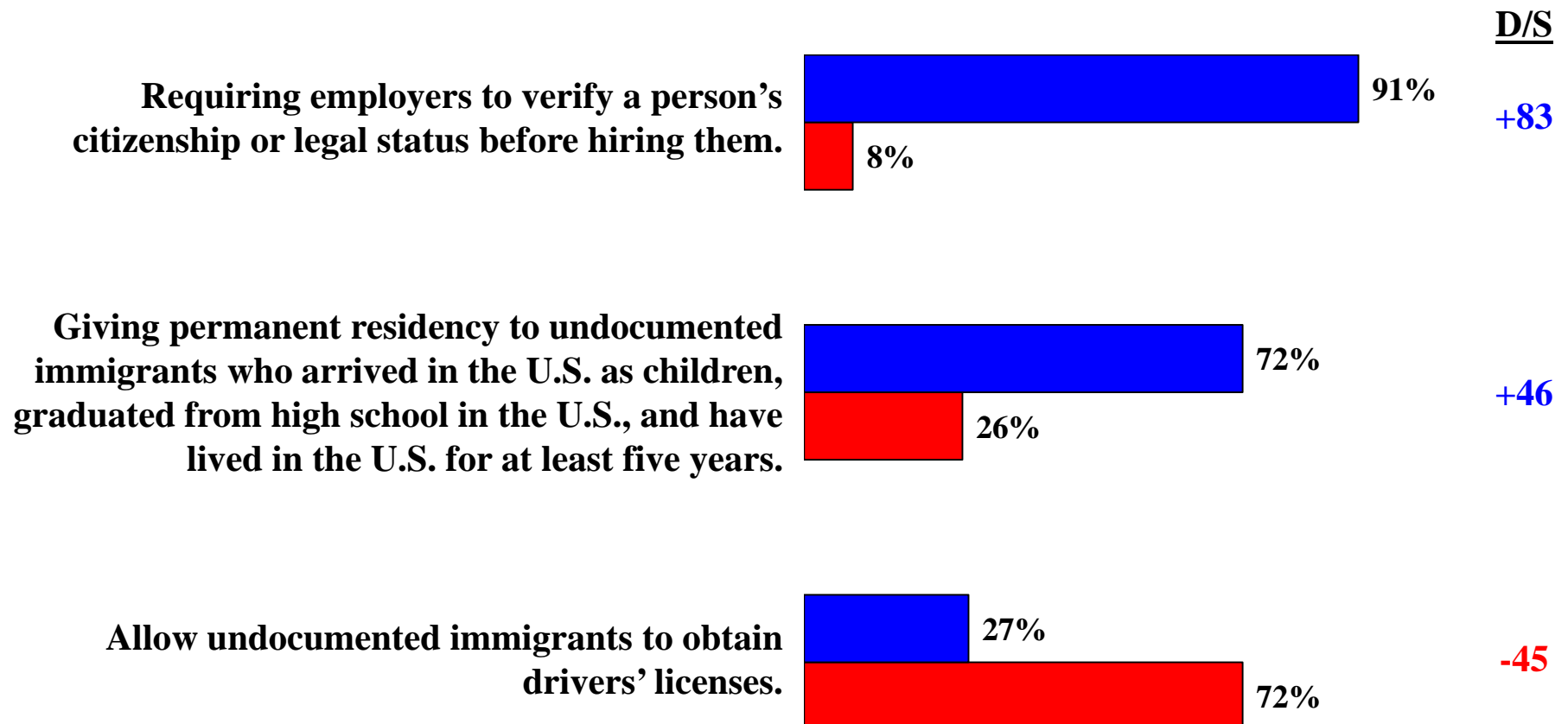
Younger voters strongly support removing the Protection of Marriage provision. Seniors oppose removing the provision.

By Age



Immigration proposals that require verification and that back permanent residency contingent upon certain circumstances have broad support.

“Thinking now about immigration, I am going to read you a list of various policy proposals related to immigration. After I read each one, please tell me if you favor or oppose it...”



Just over half of Nevada voters believe that there should be no changes to the state's gun laws.

“Turning now to gun laws in Nevada, which of the following best describes your position on gun laws in the state...”

9%

Gun laws in the state should be loosened.

36%

Gun laws in the state should be tightened.

51%

No changes to the gun laws in the state should be made.

Not surprisingly, Democrats, liberals, and voters unfavorable to the Tea Party believe the state's gun laws should be tightened.

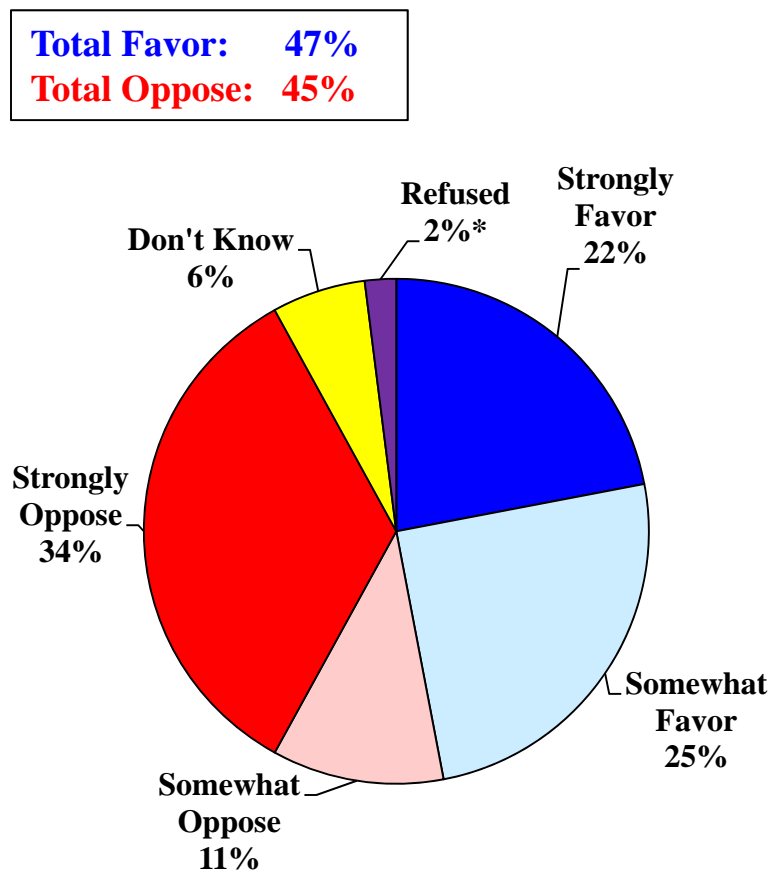
Top Groups Should be Tightened (36%)

Base Democrat	66%
Democratic Women	65%
Liberal	59%
Democratic Men	55%
African American	53%
Total Unfavorable/Tea Party	53%
Soft Democrat	50%
Third Congressional District	50%
Women 50+	49%
Total Minority	45%
Clark County Women	44%
High School or Less	43%
55-64	42%
Women w/ Degrees	42%
Women	42%

Voters are divided over whether to legalize online gambling.

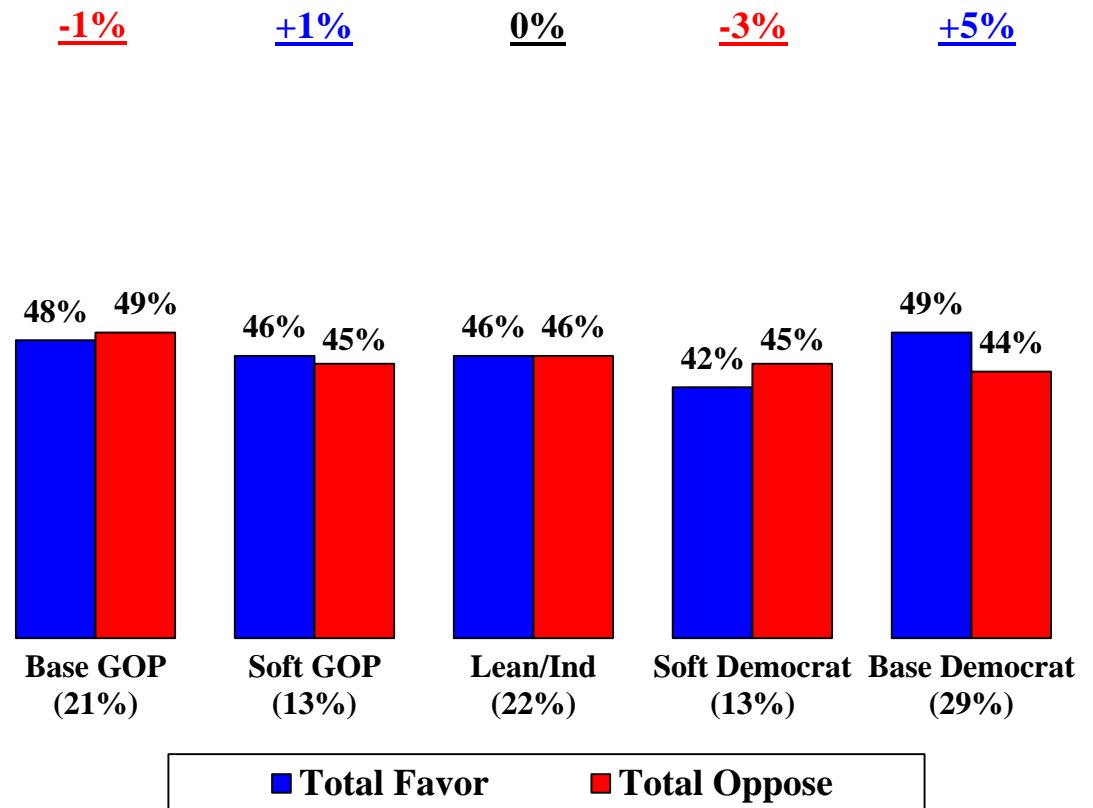
“On a different subject, would you favor or oppose legislation that would legalize online gambling in Nevada?”

Overall



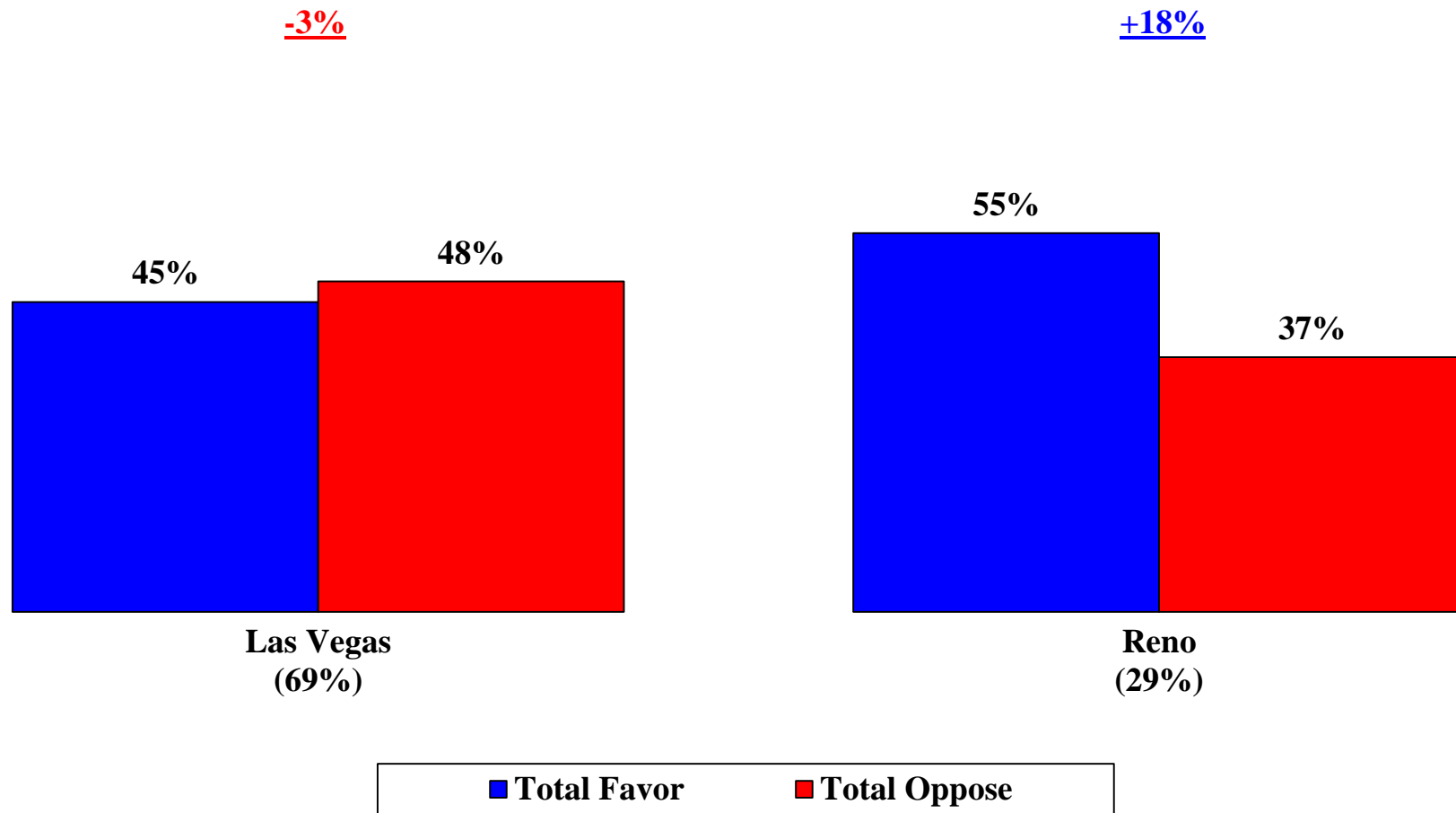
*Denotes Rounding

By Party



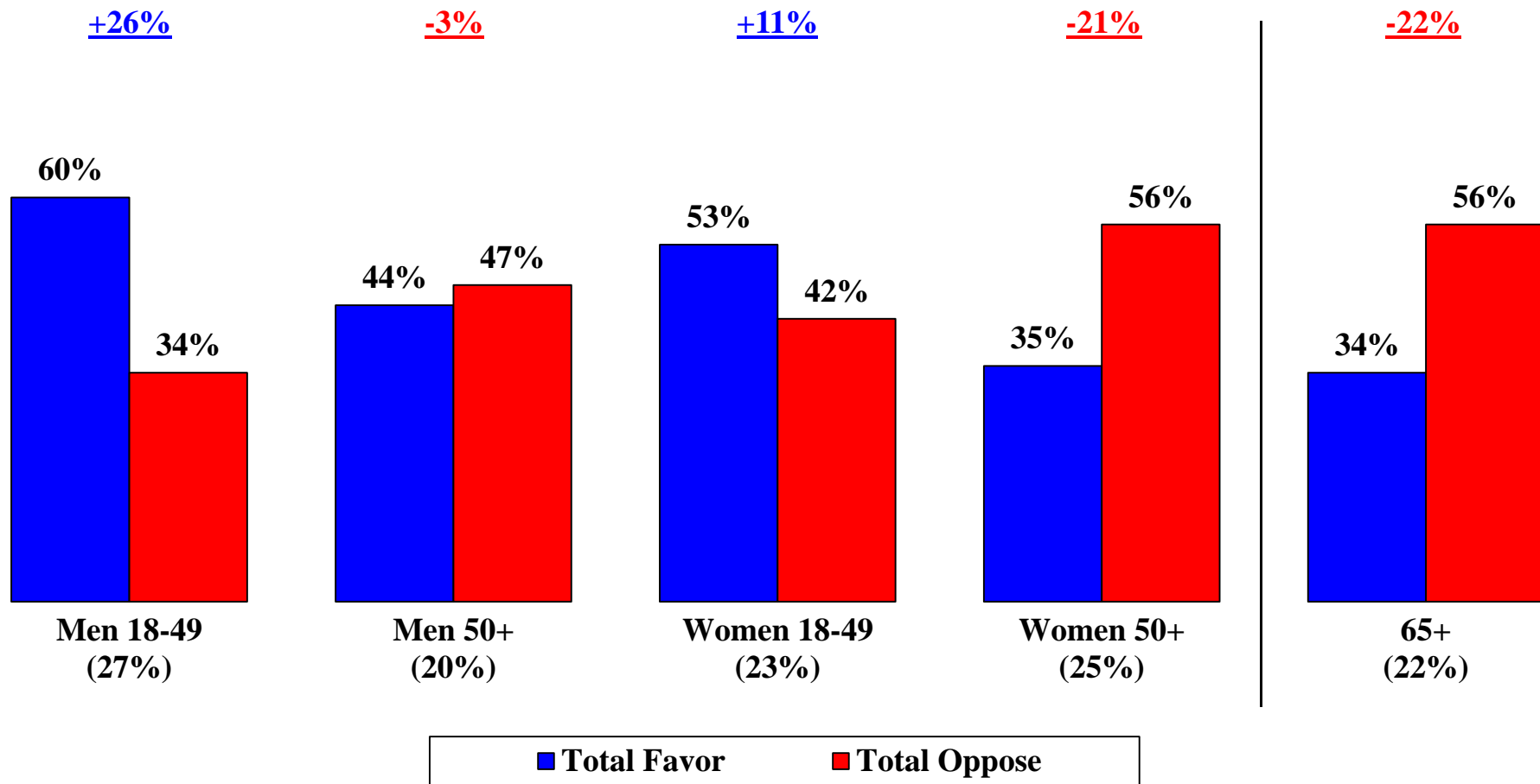
Voters are split in the Las Vegas DMA, while online gambling has solid support in Reno.

By DMA



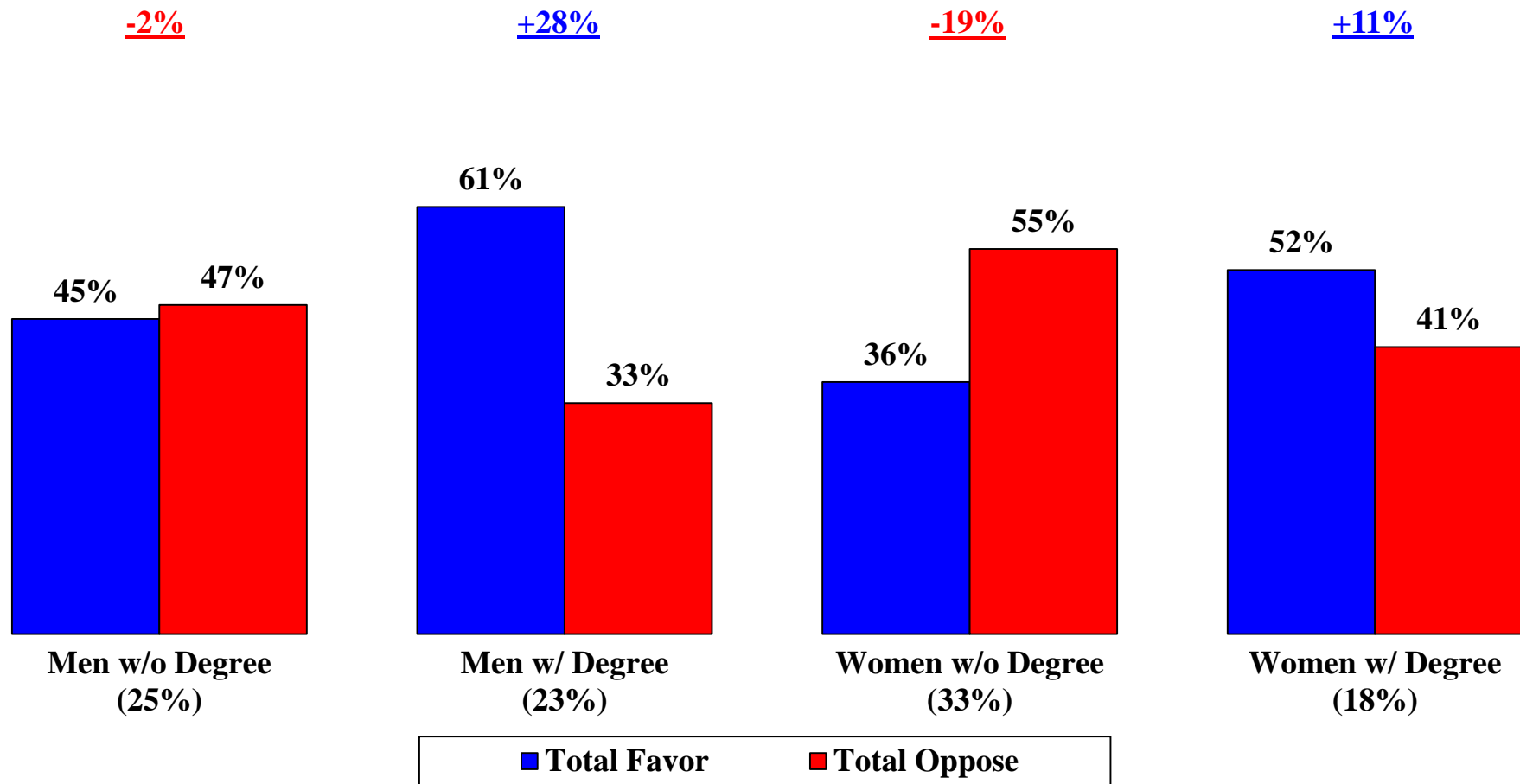
Older women and seniors oppose online gambling legalization, while younger voters are more supportive.

By Gender/Age + Seniors



Men and women with degrees are largely supportive of legalizing online gambling.

By Education/Gender



**For more information about this presentation or about
Public Opinion Strategies, please give us a call.**

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Turning Questions Into Answers

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